

Department of Veterans Affairs



IT PROJECT OFFICE EARNED VALUE MANAGEMENT USER GUIDE

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REVISION HISTORY

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INTRODUCTION

This IT Project Office Earned Value Management User Guide has been developed to assist VA Project Managers in using IT Project Office as an earned value management monitoring and control tool for projects. It should be used in combination with the published VA training, policy and Standard Operating Procedures (SOPs) available on-line at <http://vawww.va.gov/OIT/CIO/ITPM/Default.asp>.

The IT Project Office Earned Value Management User Guide consists of three sections:

- I. Recommended Settings: This section describes recommended and/or default settings for the Project, Work Breakdown Structure (WBS) and Activity levels.
- II. Maintaining and Updating a Project: This section describes the process that project team members should follow to update the status of projects.
- III. Earned Value Management-Related Reports: This section illustrates the reports available within what Office? IT Project Office that support Earned Value Management.

ASSUMPTIONS

The following assumptions apply to the use of this guide:

1. Project team members are sufficiently knowledgeable in the use of IT Project Office to be able to create projects, WBS elements, and activities;
2. Project team members have a basic understanding of earned value management and project management methodologies; and
3. Project team members are familiar with their own OMB Exhibit 300 Initiative and the milestones reported and tracked via Section I.H in the 300.

I. RECOMMENDED SETTINGS

This section of the IT Project Office Earned Value Management User Guide addresses those settings within the tool that are important for accurate earned value calculation and provides the recommended settings, where applicable.

As part of the process for creating or configuring a project, it is important for Project Managers and/or planners to define the project's properties and default settings. Particularly important are those settings that significantly affect the calculation of units and duration for earned value purposes. Selecting improper settings may reflect incorrect progress for activities and generate unreliable earned value data.

NOTE: There may be more settings on a tab than are discussed in this guide. Please refer to [SOP004: Create a Primavera Project](#) and/or [Primavera Training Materials](#) for more information on creating a project.

A. PROJECT VIEW SETTINGS

1. CODES TAB

The purpose of the Codes Tab is to assign project code values that enable the grouping of projects into specific categories, such as location, responsible manager, or OMB 300.

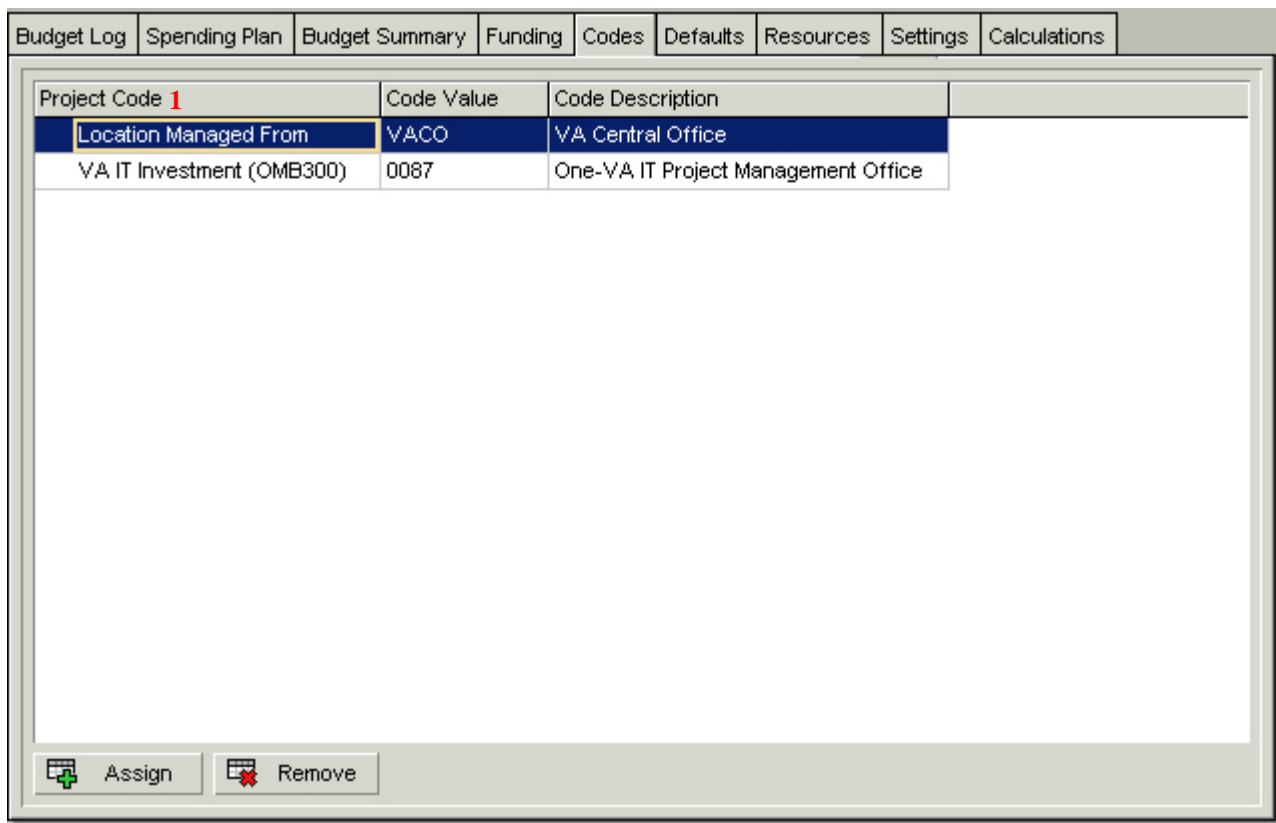


Figure 1 - Codes Tab in Project View

1. There are multiple Project Code types to choose from the Assign Project Codes dialog box. Select the Assign button at the bottom of the tab to open the dialog box. Choosing the appropriate VA IT Investment (OMB300) code is **recommended** for all projects.

NOTE: “Not related to an OMB300” is an option under the VA IT Investment (OMB300) project code.

2. DEFAULTS TAB

The purpose of the Defaults Tab is to indicate the settings that will be used when new activities are added to the project. Changing these settings will not affect any existing activities.

The screenshot shows the 'Defaults for New Activities' dialog box. The 'Defaults' tab is selected in the top menu. The settings are as follows:

Setting	Value
Duration Type	Fixed Duration & Units
Percent Complete Type	Units
Activity Type	Task Dependent
Calendar	Standard
Cost Account	[Browse]

Figure 2 - Defaults Tab in Project View

1. There are four Duration Types to choose from:

- Select “Fixed Units” when the amount of work required (usually expressed in hours) to complete an activity has been determined. This option is **recommended** for use when team members enter time to measure effort and progress for tracking actuals.
- Select “Fixed Duration & Units of Time” when duration (usually expressed in days) is determined by the type of activity. The duration will not change when resources are added or removed and/or units/time changes. This option is not recommended, since it is the least reliable in calculating percent complete.
- Select “Fixed Units/Time” when there is set resource availability to complete an activity irrespective of the activity duration and a resources’ hours/day are of paramount importance. This option is not preferred, however it can be used for Level of Effort activities to help control the number of hours per day spent by resources.
- Select “Fixed Duration & Units” when the duration and total units of work on an activity are not changed when resources are added or removed. This option is **recommended**.

2. There are three choices for “Percent Complete Type”:

- Select “Duration” when progressing project by the activity start and finish dates. This setting is not recommended as it records activity progress based on the number of workdays, instead of actual progress.
- Select “Units” to record activity progress based on actual work effort expended. This setting is **preferred** if steps cannot be added to an activity.
- Select “Physical” to record activity progress based on steps. This setting, which requires the use of steps, is **recommended** for tracking the progress of an activity.

3. There are five activity types that can be selected:

- Select “Task Dependent” when the standard project calendar will be used and resources are not an important project consideration. This is the **recommended** setting.
- Select “Resource Dependent” when the availability of scarce resources is an important project consideration and separate resource calendars will be maintained. If resource calendars are not maintained, data produced by this type will not be accurate.

- Select “Level of Effort” when activities with Fixed Units/Time are dependent on the duration of other activities, such as project management activities, testing activities, etc. This is not recommended as a Project-level setting, because this technique will not produce meaningful earned value indices.
 - Select “Start Milestone” to denote the beginning of a project deliverable or phase. This setting is not recommended as the default Project-level setting, unless the project contains only milestones at a high level, such as those milestones contained in a Master Project Schedule.
 - Select “Finish Milestone” to denote the ending of a project deliverable or phase. This setting is not **recommended** as the default Project-level setting, unless the project contains only milestones at a high level, such as those milestones contained in a Master Project Schedule.
4. The default calendar is the standard calendar (5 x 8 hr work week). The default calendar is the **recommended** calendar. If another calendar is created, it must be based on the standard calendar to ensure that federal holidays will be automatically updated.

3. RESOURCES TAB

The purpose of the Resources Tab is to allow the Project Manager to specify the project’s resource permissions for Timesheets. Project Managers must consider the options they select and the permissions they delegate to resources.

Figure 3 - Resources Tab in Project View

Resource Assignments

1. Select “Resources can be assigned to the same activity more than once” to allow a resource to be added to the same activity multiple times. Retaining the default selection of this option is generally not recommended. It may cause confusion for team members when entering time on timesheets, however, this is appropriate when resources are assigned intermittently.

Timesheets

2. Select “Primary resources can mark activities as Completed” to allow resources to indicate completed activities via Timesheets. Choosing this option is **recommended** because it reduces overhead for the Project Manager.

3. Select “Resources can assign themselves to activities” to grant resources the ability to add themselves to an activity using the Timesheets module. Choosing this option is not recommended as resources will be assigned the full default units/time (e.g., 8 hours/day) and the Project Manager will have to modify the resource units over time.
4. Select either “Resources can edit activity assignment percent complete” or “Resources can edit activity assignment remaining units” to identify the method that the primary resources will use to communicate status via the Timesheets module. Retaining the default option in which remaining units are edited is **preferred**.

Resource Assignment Defaults

5. Update this option if the default “Price/Unit” is not the correct rate. Up to five different rates can be active for a single resource at any given time.

4. SETTINGS TAB

The purpose of the Settings Tab is to specify summarization information and project-level settings for the project.

Budget Log	Spending Plan	Budget Summary	Funding	Codes	Defaults	Resources	Settings	Calculations
<div> <div> Summarized Data </div> <div> <input type="checkbox"/> Contains Summarized Data Only Last Summarized On 17-May-05 Summarize to WBS Level 3 Baseline for Summarization Original Baseline with Costs </div> </div> <div> Project Settings </div> <div> Character for separating code fields for the WBS tree . </div> <div> 3 Fiscal year begins on the 1st day of October </div> <div> Critical Activities </div> <div> Define critical activities as 4 Total Float less than or equal to 5 Longest Path </div>								

Figure 4 - Settings Tab in Project View

Summarized Data

The fields in the Summarized Data area determine how the information for the Enterprise Project Structure (EPS) node or project will be summarized.

1. Set “Summarize to WBS Level” to the number of levels project stakeholders will be able to drill down. Choosing a number equal to or higher than 3 is **recommended**, depending on management requirements.
2. Set the “Baseline for Summarization” to determine the baseline that will be used for summarization (i.e., OMB Exhibit 300 approved baseline). Summarized data will always reflect the data the Project Manager has defined. For a consistent display of data, “Baseline for Summarization” must match the tool’s Primary baseline. Individuals viewing live data must also select the same baseline as shown in the “Baseline for Summarization” as their Primary baseline (found on the Project menu “Project/Baselines....”)

NOTE: During initial project planning, a baseline for summarization will not be available. Project Managers must return to this tab to set this option once a baseline has been established

or revised and re-approved by the appropriate management level. Please refer to SOP 004 for information on creating a baseline.

Project Settings

The fields in the Project Settings area determine the first month of the fiscal calendar and the character for separating code fields for the WBS hierarchy.

3. Change the default from January to October, which is the start of the Federal Government's fiscal year.

Critical Activities

The options in the Critical Activities area determine the maximum float time for activities before they are marked critical. Only one option may be selected.

4. Select "Total Float less than or equal to" to assign a maximum time for project activities to float before they affect the project's critical path. This setting allows team members to "customize" activities on the critical path by adding more activities than the default of zero days. For large projects, it is **recommended** that the default of 0.0 days be retained, and thresholds be established for identifying problems. For smaller projects, it may be acceptable for the default setting to be changed to a number higher than 0.0.
5. Select "Longest Path" to determine the critical path based on PMI's definition. This is the **recommended** setting for most projects as it supports the Project Management Institute's theory that the CPM is the longest path and has zero float. It is important to note, however, that there may be more than one critical path, therefore, it is important for the Project Manager to establish threshold criteria to help identify those activities that may impact the project's end date.

5. CALCULATIONS TAB

The purpose of the Calculations tab is to specify how to calculate cost and estimate resource use when you update activities in the selected project.

Figure 5 - Calculations Tab in Project View

Resource Assignments

1. Select “Subtract Actual from At Completion.” This setting ensures that the To Complete units and costs are reduced by the value of the actuals and that the planned At Completion value will not change until the actual units or costs exceed it. Retaining the default setting, “Add Actual to Remaining” will result in improper earned value calculations since it will increase the total remaining units.
2. Maintain the default and do NOT select “Recalculate Actual Units and Cost when duration % complete changes.” If it is selected, then actual units and cost will be driven by duration percent complete instead of by units and costs entered by project team members, resulting in the Actual Units being reduced rather than increased.
3. Check “Update units when costs change on resource assignments” to allow the tool to recalculate project costs when a resource’s pay rate changes. The application default for this option is un-checked.
4. Maintain the default selection of “Link Actual and Actual This Period Units and Cost.” Selecting this option ensures that resource assignment costs will be recalculated when new resource costs are entered in the database by the system administrator.

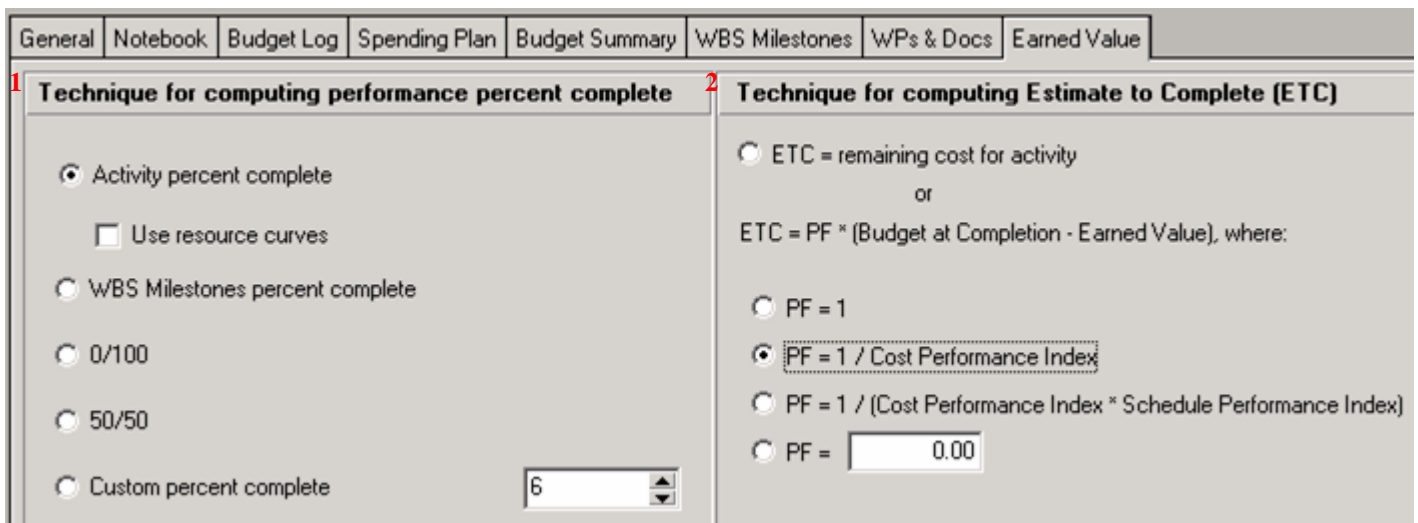
Activities

5. Select “Activity percent complete based on activity steps.” The step function allows activities to be broken down into smaller elements, called Steps, which may be “weighted” by the Project Manager/team to determine the percent complete value when the step is marked as complete. If this selection is made and no steps are associated with an activity, the setting is ignored in calculations.
6. Set “Default Price/Unit for activities without resource Price/Unit,” if appropriate. This is appropriate when using a role or generic resource.

B. WBS VIEW SETTINGS

1. EARNED VALUE TAB

The purpose of the Earned Value Tab is to determine the technique for computing earned value.



The screenshot displays the 'Earned Value' tab within a software interface. The tab is divided into two main sections, labeled 1 and 2.

Section 1: Technique for computing performance percent complete

- ☒ Activity percent complete
 - ☐ Use resource curves
- ☐ WBS Milestones percent complete
- ☐ 0/100
- ☐ 50/50
- ☐ Custom percent complete (with a spinner box set to 6)

Section 2: Technique for computing Estimate to Complete (ETC)

- ☐ ETC = remaining cost for activity
- or
- ETC = PF * (Budget at Completion - Earned Value), where:
 - ☐ PF = 1
 - ☒ PF = 1 / Cost Performance Index
 - ☐ PF = 1 / (Cost Performance Index * Schedule Performance Index)
 - ☐ PF = [text box containing 0.00]

Figure 6 - Earned Value Tab in WBS View

1. Technique for computing performance percent complete

There are five choices in the Technique for computing performance percent complete area. Each can be appropriate depending on the situation.

1. Select “Activity percent complete” to calculate earned value according to current activity completion percentages. Choosing this option requires accurate and weekly posting of project hours to the appropriate activities and is the **recommended** setting for a majority of projects.
2. Select “WBS Milestones percent complete” when deliverables are the only items tracked in a particular WBS element. No activities may be included. Choosing this option is not preferred; however it is acceptable when tracking the deliverables of a Firm-Fixed Price contract.
3. Select 0/100 % complete when activity durations are contained within a single reporting period; i.e., one month for OMB projects. This is not the preferred option because it only allows credit to be earned when work is 100% complete and zero progress is reflected when actual work has been performed
4. Select 50/50% complete when activity durations are contained within a single reporting period; i.e., one month for OMB projects. This is not the preferred option because it allows credit to be earned when work has not been completed. Half of the credit is earned when the activity starts and half of the credit is earned when the activity is complete.
5. Select “Custom percent complete” provides the Project Manager with the option of making a subjective determination of percent complete for at the activity level. Choosing this is not a preferred option at this time because it credits value of work in an arbitrary manner.

2. Technique for computing Estimate to Complete (ETC)

- Select “PF=1 / Cost Performance Index” to determine the ETC for a project. Choosing this option is **recommended**. Choosing this option will help forecast completion costs based on current trends in project performance and corresponds with the formula presented in the OMB Exhibit 300.

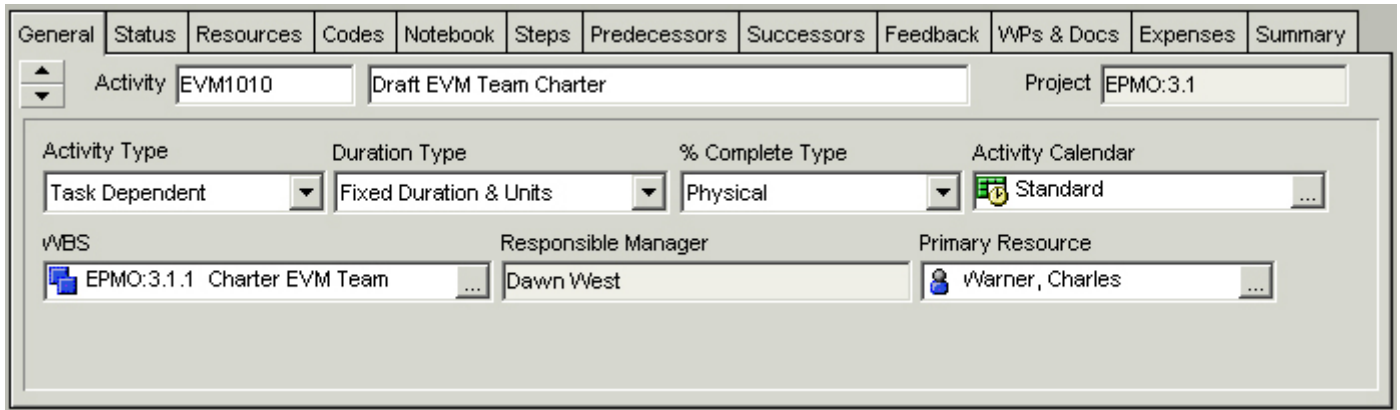
NOTE: To ensure that projects can be compared consistently, it is important that the proper selection for computing ETC is made.

C. ACTIVITY VIEW SETTINGS

NOTE: The settings for new activities are determined by the settings in the project level “Defaults” tab. Activities that have already been created will not be impacted. The settings can be changed at the activity level if the default settings are not appropriate for the selected activity.

1. GENERAL TAB

The purpose of the general tab is to allow you to identify and/or change activity settings applied by the default settings at the project level as appropriate. Detailed information was provided in the Project View section.



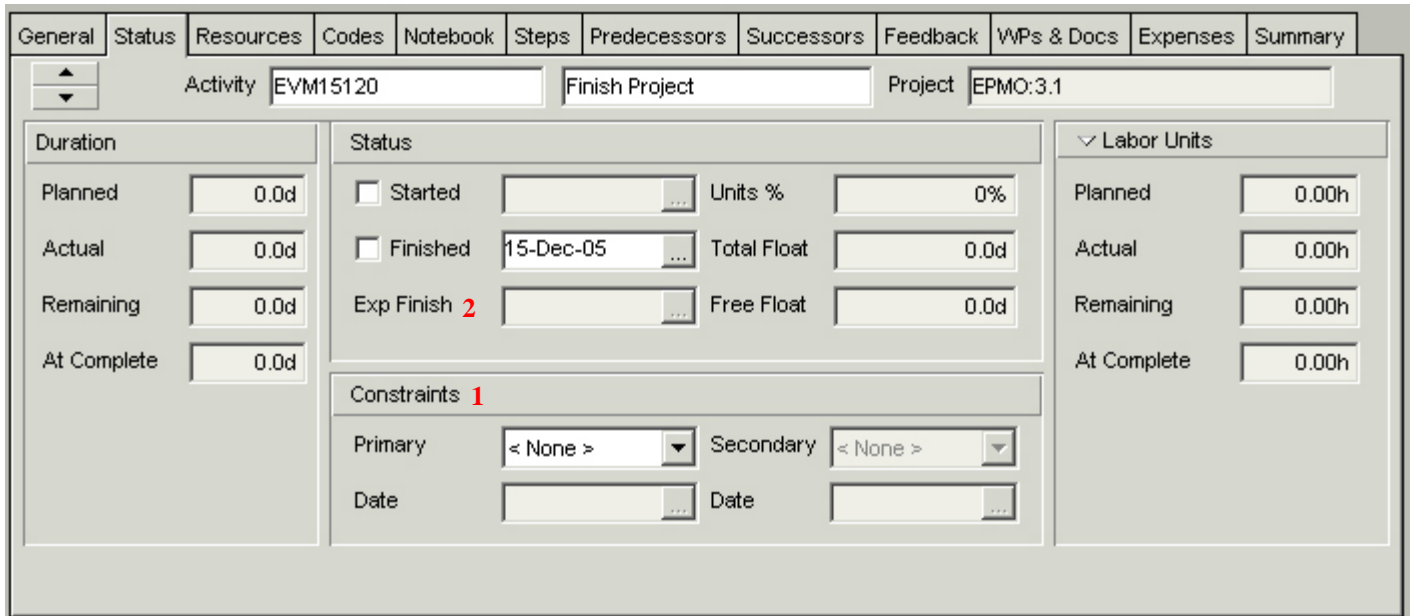
General	Status	Resources	Codes	Notebook	Steps	Predecessors	Successors	Feedback	WPs & Docs	Expenses	Summary
Activity: EVM1010 Draft EVM Team Charter Project: EPMO:3.1											
Activity Type: Task Dependent		Duration Type: Fixed Duration & Units		% Complete Type: Physical		Activity Calendar: Standard					
WBS: EPMO:3.1.1 Charter EVM Team				Responsible Manager: Dawn West				Primary Resource: Warner, Charles			

Figure 7 - General Tab in Activity View

NOTE: If Start Milestone or Finish milestone is selected as the Activity type, the Activity Calendar must be changed to a 24-hour calendar. This ensures that the milestone will occur on the selected day. The standard calendar should remain the default for Task Dependant or Resource Dependant Activity Types.

2. STATUS TAB

The purpose of the Status tab is to define planned duration and units, place constraints on project activities and review the progress of the activities duration, labor units, and start and finish status.



General	Status	Resources	Codes	Notebook	Steps	Predecessors	Successors	Feedback	WPs & Docs	Expenses	Summary
Activity: EVM15120 Finish Project Project: EPMO:3.1											
Duration		Status				Labor Units					
Planned: 0.0d		<input type="checkbox"/> Started		Units %: 0%		Planned: 0.00h					
Actual: 0.0d		<input type="checkbox"/> Finished: 15-Dec-05		Total Float: 0.0d		Actual: 0.00h					
Remaining: 0.0d		Exp Finish: 2		Free Float: 0.0d		Remaining: 0.00h					
At Complete: 0.0d		Constraints 1									
		Primary: < None >		Secondary: < None >							
		Date:		Date:							

Figure 8 - Status Tab in Activity View

1. Constraints prevent the tool from progressing the schedule based on the project and activity settings; therefore, they should only be used if absolutely essential. Also, only Mandatory constraints are honored if an activity has no float.
2. “Exp Finish” constraints are honored if the activity has no float.

3. CODES TAB

The purpose of the Codes Tab is to assign one or more identifiers (activity code) to each activity. This will allow activities, along with all of their associated attributes, to be filtered, grouped, sorted, or “rolled-up” according to specific organizational or project needs. This, in turn, will allow for the generation of data and the creation of reports used in analyzing status at the project, WBS, or activity level.

Activity Code	Code Value	Description
0087 - OneVA IT Project Office PMO	8	3.1 TeamPlay in-use on 98% of Exhibit 300s (excluding Steady State 300s)

Figure 9 - Codes Tab in Activity View

1. There are two forms of Activity Codes to choose from the Assign Activity Codes dialog box: global codes developed by system administrators and project codes developed by responsible managers within the tool. Select the Assign button at the bottom of the tab to open the dialog box.

Global Activity Codes

Global codes allow activities to be organized within a project or across the EPS. Choosing the appropriate code that corresponds to the activity’s approved OMB Exhibit 300 initiative and Section I.H. milestone is **recommended** for all projects. This activity code will associate the cost and schedule for that activity to the appropriate milestone and address the OMB and VA requirements for tracking and reporting earned value statistics against milestones documented in the approved OMB Exhibit 300.

Other options for mapping schedule and cost elements against OMB Exhibit 300 milestones are being explored and tested. If/when other viable and practical options are found, implementing instruction will be provided.

Note: Groups of activity codes specific to an OMB Exhibit 300 initiative are preceded by a four digit number that corresponds to the Accounting Classification Code (ACC), as illustrated in Figure 10. Groups of generic activity codes are contained in groups without numeric designators following the OMB Project specific groups.

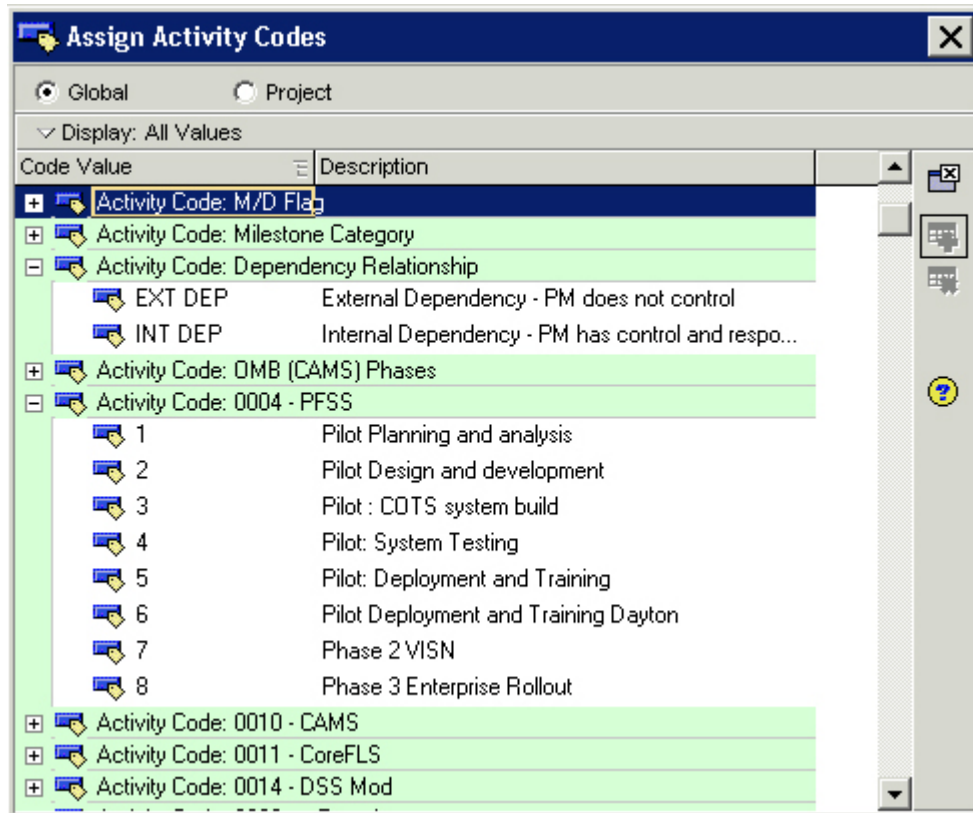


Figure 10: Assign Activity Codes dialog box

Project Activity Codes

Project-level codes are only available in the project in which they were created and allow activities to be organized based on unique, project specific requirements.

4. EXPENSES TAB

The purpose of the Expenses tab is to enter and track the expense(s) associated with an activity, which typically consists of direct and indirect costs to the project (i.e., direct expenses related to Firm Fixed Price contracts.) Expenses may also be entered and tracked at all levels (WBS and Activity) from the Expenses View.

Expense Item	Cost Account	Expense Category	Accrual Type	Planned Cost	Actual Cost	Remaining Cost
PMBOK		Materials	Start of Activity	\$9,342.00	\$0.00	\$9,342.00

Figure 11 - Expenses Tab in Activity View

1. Insert the contract line item number, when applicable, under the Expense Item.
2. Select an Expense Category to identify the expense type.
3. Select an “Accrual Type” to determine when an expense should be added to the project cost. The recommendation for most expenses is “Start of Activity;” however, there are instances when an expense may occur at the “End of Activity” such as when a deliverable has been completed. “Uniform over Activity” may be used in certain level of effort activities, such as travel and office supplies when you don’t know exactly when the funds will be spent.

Note: Projects that include contracts with set payment schedules should create payment/invoice milestones to ensure that earned value calculations are not skewed. Advance payments will be treated like a Firm Fix Price contract as referenced in SOP 009.

II. MAINTAINING AND UPDATING A PROJECT

Project managers are required to update project data each week. This section of the IT Project Office Earned Value Management User Guide addresses how projects are to be updated (statused).

Note: The tool takes into consideration the presence, or absence, of actuals for Labor, Non-labor and Expenses when calculating the Cost Performance Index (CPI) and Schedule Performance Index (SPI). At least one of these costs areas must be present for the calculations to work properly. Also, the formula for calculating Budgeted Cost of Work Performed (BCWP), or Earned Value (EV), is Budget at Completion multiplied by performance percent complete ($BAC \times \text{Performance \% Complete}$), which is a selectable element within the Earned Value Tab, WBS View. The BAC is calculated as the highest value of Budgeted Cost of Work Scheduled (BCWS), or Planned Value (PV).

A. ESTABLISH PROJECT BASELINE

Project Baselines are a snapshot of the state of the project at a particular date and time. It is the reference used by the tool, and the Project Manager, to determine if a variance exists from when the baseline is established (start of project) when compared to the current project status (tracks a project’s cost and schedule performance).

For detailed instructions on creating a baseline, please refer to [Baselining the Project](#) Lesson in the [Primavera Training Materials](#).

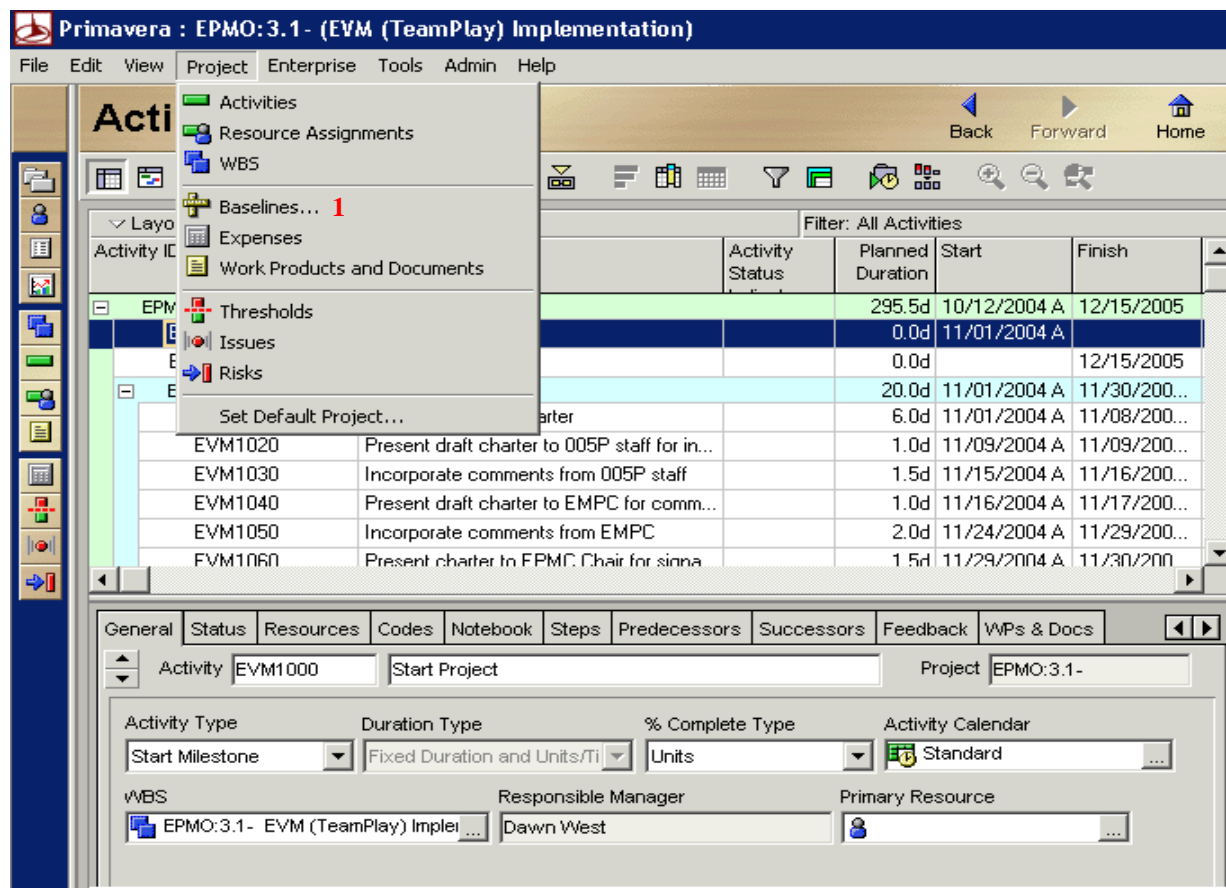


Figure 12 - Baselines... Option from Project Menu

1. Create an Initial Planning baseline before updating the schedule (applying actual labor units to the project) by selecting the “Baselines...” option from the Project menu.

Note: A baseline must be created for all OMB Exhibit 300-level projects that matches the approved baseline as represented in the Exhibit Table I.H.2 or 3. Changes should not be made to a baseline without the appropriate approval(s). Also, official or approved baselines should never be deleted within the tool.

B. REVIEW AND APPROVE/REJECT TIMESHEETS

The purpose of Timesheets is to allow project team members to communicate the status of their activities to the Project Manager. This data is then used by the tool to record progress and calculate earned value information. Please refer to [SOP 008](#) for more information on VA’s use of Timesheets or the [module training](#) to learn more about the actual use of the tool.

Primavera : 0291 - EPMS (FY05) (FY05 Primavera IT Project Mgmt. Office)

File Edit View Project Enterprise Tools Admin Help

Time Approval

Period: 13-Feb-05 - 19-Feb-05 Privilege: Project Manager Level: 2 Approval Levels (PM<->RM)

Display: All Timesheets

Resource ID	Resource	Submitted	Reviewer	Reviewed	Status
BOLANLI	BOLAND, LIDA	22-Feb-05	timeappVHA	22-Feb-05	RM Approved
BOYLEDO	BOYLE, DONALD L	22-Feb-05	vhaistharfik	23-Feb-05	Approved
HINOJRO	HINOJOSA, ROSIE	23-Feb-05	vhadmajonesr	24-Feb-05	Approved
JAMESJI1	JAMES, JILL	18-Feb-05	timeappVHA	22-Feb-05	Approved
JONESRU	JONES, RUSS	18-Feb-05	vhadmajonesr	21-Feb-05	Approved
MARTHAR	MARTHA, ARUNA	14-Feb-05	vhadmajonesr	21-Feb-05	Approved
MROWCED	MROWCZYNSKI, ED M	18-Feb-05	timeappVHA	22-Feb-05	Approved
MURRACH1	MURRAY, CHARLENE	22-Feb-05	vhadmajonesr	23-Feb-05	Approved
PAIGEGR1	PAIGE, GREG	22-Feb-05	vhaaisapaigeg	23-Feb-05	Approved
SNEDDRU1	SNEDDEN, RUTH	28-Feb-05	timeappVHA	28-Feb-05	RM Approved

Display: All

Status	Project	Activity ID	Activity Name	Sun 13-2	Mon 14-2	Tue 15-2	Wed 16-2	Thr 17-2	Fri 18-2	Sat 19-2	Total Hours
Approved	NPW/VHA	A1020	Administrative Tl...		1.00	0.50					1.50
Approved	NPW/VHA	A1050	Operational supp...			1.00					1.00
Approved	NW/VHA	A1080	Generic Leave			3.25	2.00		3.50		8.75
RM Approved	EPMD:3.1-	EVM15000	Attend standard ...		1.00						1.00
PM Approved	0291 - EPMS (F...	PM01010	Attend Teak Co...					1.00			1.00
PM Approved	0291 - EPMS (F...	PM01030	Misc. PMO activi...		1.00		1.50				2.50
PM Approved	0291 - EPMS (F...	PM01040	All admin activitie...		1.00		1.00	1.00	0.50		3.50
PM Approved	0291 - EPMS (F...	PM01060	Create reports, is...			0.75	3.00				3.75
PM Approved	0291 - EPMS (F...	PM01070	Review reports, l...		1.00			0 / ...	0 /00 / 2.00
PM Approved	0291 - EPMS (F...	PM01090	Attend Meetings...			1.00					1.00
PM Approved	0291 - EPMS (F...	PM01100	Pre and post trai...		3.00	1.50		1.00	4.00		9.50
PM Approved	0291 - EPMS (F...	PM01130	Methodologists a...				0.50	5.00			5.50

Close

Approve

Reject

Refresh

Notes

Reports

Help

Figure 13 - Time Approval Dialog Box

C. APPLY ACTUALS

The application of actuals updates the project's status based on information included in approved timesheets.

Note: It is recommended that the Responsible Manager apply actuals to one project at a time to ensure that a notification of outstanding timesheets is generated. It is necessary to resolve a resource's timesheet deficiencies before completing the "Apply Actuals" process, which may include rejecting timesheets. If a resource is active on multiple projects, each Project Manager must approve the resource's timesheet before any Project Manager can apply actuals.

For more information about how to Apply Actuals, please refer to [Progressing the Project Plan](#) Lesson in the [Primavera Training Materials](#)

Apply Actuals

Project(s) to be updated:

Project ID	Project Name	Current Data Date	Planned Start
EPMO:1.1	PM Training	12-Oct-04	01-Oct-04
EPMO:1.2	2005 PM Confere...	08-May-05	16-Aug-04
EPMO:2.2	Capital Planning I...	17-Feb-04	17-Feb-04
EPMO:2.3	IT Strategic Plan	17-Feb-04	17-Feb-04
EPMO:3.1	EVM (TeamPlay) I...	06-Feb-05	01-Nov-04

A new data date is used when actuals are applied.

☐ Each project uses its own new data date

☒ The same new data date is used for all projects

New Data Date: 15-May-05

When actuals are applied from timesheets, calculate activity remaining durations:

☒ Based on activity duration type

☐ Always recalculate

Apply Cancel Help

Figure 14 - Apply Actuals Dialog Box

1. To ensure the proper duration type is used to calculate activity remaining durations, select “Based upon activity duration. Select Tools/Apply Actuals from the Menu bar to open the Apply Actuals dialogue box.

D. MANUALLY ENTER PROJECT ACTUAL AND REMAINING COSTS

Some expenses, such as Firm Fixed Price contract payments/invoices, must be manually entered. For each activity that has incurred costs, the Project Manager must enter the cumulative actual cost as of the Data Date. The Remaining Cost value may need to be revised if it is not automatically computed.

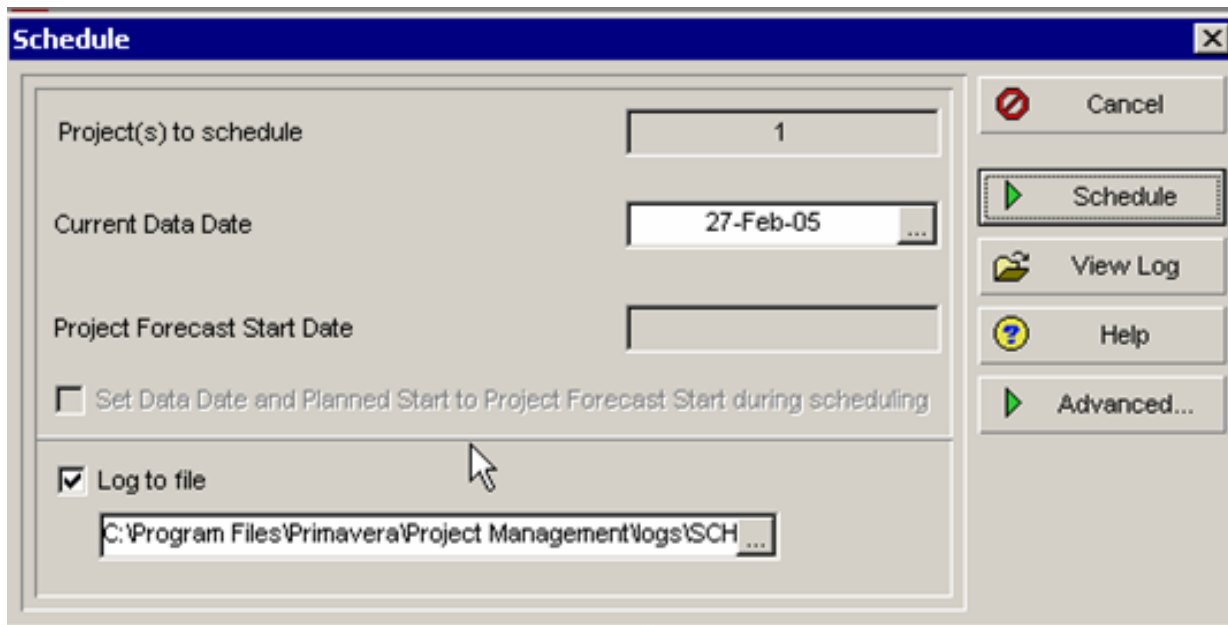
Figure 15 - Project Expense View

From any view, select Project/Expenses from the Menu Bar or Expenses box on the directory bar for the above view. Another option for entering Activity expenses is to use the Expenses Tab from the Activities View, as illustrated by Figure 11 in Recommended Setting, Activities View, Expenses Tab section (I.C.4).

E. SCHEDULE THE PROJECT

Schedule the project to determine how long the project will last and when activities will occur relative to the project or activity calendar.

For more information regarding scheduling a project and advanced schedule options, please refer to [Scheduling the Project](#) Lesson in the [Primavera Training Materials](#) and SOP004 and Appendix A.



The Schedule dialog box is titled "Schedule" and contains the following fields and buttons:

- Project(s) to schedule:** A text box containing the number "1".
- Current Data Date:** A date field showing "27-Feb-05" with a calendar icon.
- Project Forecast Start Date:** An empty date field.
- Set Data Date and Planned Start to Project Forecast Start during scheduling:** An unchecked checkbox.
- Log to file:** A checked checkbox.
- File path:** A text box showing "C:\Program Files\Primavera\Project Management\logs\SCH..." with a browse button.
- Buttons on the right:** "Cancel" (with a red X icon), "Schedule" (with a green play icon), "View Log" (with a document icon), "Help" (with a question mark icon), and "Advanced..." (with a green play icon).

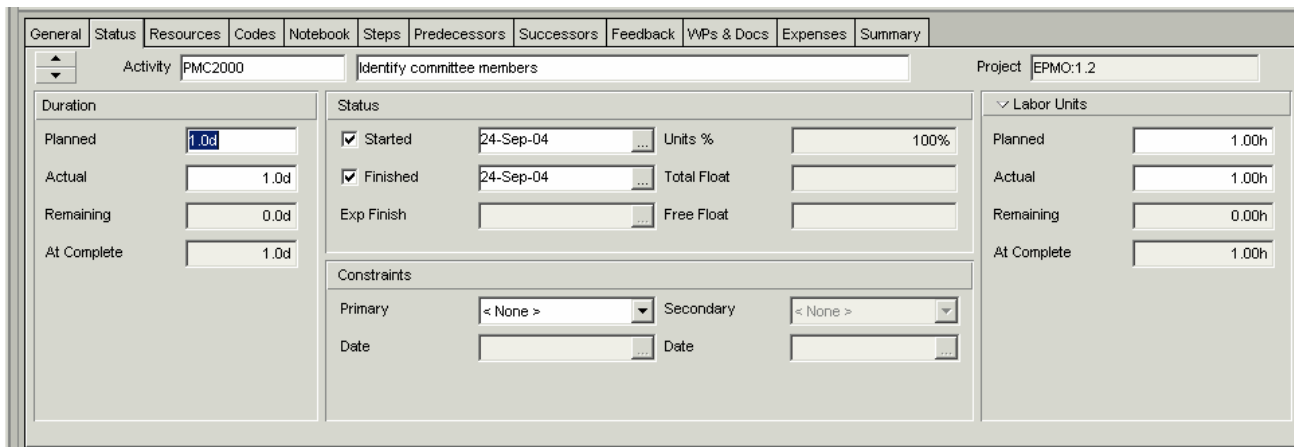
Figure 16 - Schedule Dialog Box

Open the Schedule dialog box by either:

- Selecting Schedule from the Tools menu,
- Pressing the F9 key, or
- Selecting the schedule icon at the top of the screen (toolbar) in the Activities view

F. UPDATE PROGRESS OF PROJECT

Once actuals have been applied and the project has been rescheduled, review the status of each activity that has started. The "Units %" complete field should be automatically calculated depending on the % complete type chosen, except for "Physical %" complete when steps are not present. If this field has not been updated, the Project Manager must manually enter the "Physical %" complete data. The Project Manager must start the activity in order to modify the "Physical %" complete. If the activity is 100% complete, the Project Manager must check the "Finished" box for all percent complete types.



The Status tab in the Activity View shows the following data for Activity "PMC2000" (Identify committee members) in Project "EPMO:1.2":

Duration		Status		Labor Units	
Planned	1.0d	<input checked="" type="checkbox"/> Started	24-Sep-04	Units %	100%
Actual	1.0d	<input checked="" type="checkbox"/> Finished	24-Sep-04	Total Float	
Remaining	0.0d	Exp Finish		Free Float	
At Complete	1.0d				

Constraints:

Primary	Secondary
< None >	< None >
Date	Date

Figure 17 - Status Tab in Activity View with Actuals (Units %)

General	Status	Resources	Codes	Notebook	Steps	Predecessors	Successors	Feedback	WPs & Docs	Expenses	Summary
Activity: <input type="text" value="PMC1010"/>		Draft conference approval package								Project: <input type="text" value="EPMO:1.2"/>	
Duration Planned: <input type="text" value="5.0d"/> Actual: <input type="text" value="5.0d"/> Remaining: <input type="text" value="0.0d"/> At Complete: <input type="text" value="5.0d"/>		Status <div> <input checked="" type="checkbox"/> Started <input type="text" value="23-Aug-04"/> ... Physical % <input type="text" value="100%"/> </div> <div> <input checked="" type="checkbox"/> Finished <input type="text" value="27-Aug-04"/> ... Total Float <input type="text"/> </div> <div> Exp Finish <input type="text"/> ... Free Float <input type="text"/> </div>								Labor Units Planned: <input type="text" value="0.00h"/> Actual: <input type="text" value="0.00h"/> Remaining: <input type="text" value="0.00h"/> At Complete: <input type="text" value="0.00h"/>	
Constraints Primary: <input type="text" value="< None >"/> Secondary: <input type="text" value="< None >"/> Date: <input type="text"/> Date: <input type="text"/>											

Figure 18 - Status Tab in Activity View with Actuals (Physical %)

G. DISPLAY PROGRESS IN THE EARNED VALUE ANALYSIS LAYOUTS

Several layouts have been created to allow Project Managers to review their earned value statistics at the Project, WBS and Activity levels.

1. GENERAL EARNED VALUE LAYOUTS

Layout: Earned Value % Complete Type				Filter: All Activities					
Activity ID	Activity Name	Duration % Complete	Physical % Complete	Units % Complete	Activity % Complete	Performance % Complete	Budget At Completion	Earned Value Cost	Actual Cost
EPMD:3.1-	EVM (TeamPlay) Implemen...	26.73%		0.31%		0.08%	\$1,341,581.63	\$1,052.00	\$2,312.00
EVM1000	Start Project	100%	0%	0%	0%	0%	\$0.00	\$0.00	\$0.00
EVM1512	Finish Project	0%	0%	0%	0%	0%	\$0.00	\$0.00	\$0.00
EPMD:3.1-1	Charter EVM Team	100%		100%		85.71%	\$588.00	\$504.00	\$588.00
EVM10	Draft EVM Team Charter	100%	100%	100%	100%	100%	\$280.00	\$280.00	\$280.00
EVM10	Present draft charter to O...	100%	100%	100%	100%	100%	\$112.00	\$112.00	\$112.00
EVM10	Incorporate comments fro...	100%	0%	100%	100%	100%	\$56.00	\$56.00	\$56.00
EVM10	Present draft charter to E...	100%	100%	100%	100%	100%	\$56.00	\$56.00	\$56.00
EVM10	Incorporate comments fro...	100%	0%	100%	0%	0%	\$56.00	\$0.00	\$56.00
EVM10	Present charter to EPMC ...	100%	0%	100%	0%	0%	\$28.00	\$0.00	\$28.00
EPMD:3.1-2	Communicate EVM M...	0%		60.98%		37.73%	\$1,304.00	\$492.00	\$856.00
EVM20	Draft EVM Scoring Criteri...	100%	0%	100%	0%	0%	\$112.00	\$0.00	\$112.00
EVM20	Present draft criteria to OO...	100%	0%	100%	0%	0%	\$28.00	\$0.00	\$28.00
EVM20	Incorporate comments fro...	100%	0%	100%	100%	100%	\$56.00	\$56.00	\$56.00
EVM20	Present draft criteria to E...	100%	0%	100%	0%	0%	\$84.00	\$0.00	\$84.00
EVM20	Incorporate comments fro...	100%	0%	100%	100%	100%	\$56.00	\$56.00	\$56.00
EVM20	Consolidate criteria memo...	100%	0%	100%	100%	100%	\$240.00	\$240.00	\$240.00
EVM20	Present draft consolidate...	100%	0%	100%	0%	0%	\$84.00	\$0.00	\$84.00
EVM20	Incorporate comments fro...	100%	0%	100%	100%	100%	\$28.00	\$28.00	\$28.00
EVM20	Present consolidated me...	100%	0%	100%	0%	0%	\$56.00	\$0.00	\$56.00
EVM20	Revise Master Grade Ch...	100%	0%	100%	100%	100%	\$56.00	\$56.00	\$56.00
EVM21	Maintain MGC currency	0%	0%	11.11%	11.11%	11.11%	\$504.00	\$56.00	\$56.00
EPMD:3.1-3	Develop EVM PMP a...	0%		0%		0%	\$37,848.00	\$0.00	\$0.00
EVM15	Start EVM PMP Develop...	0%	0%	0%	0%	0%	\$0.00	\$0.00	\$0.00
EVM15	Finish EVM PMP Develo...	0%	0%	0%	0%	0%	\$36,000.00	\$0.00	\$0.00

Figure 19 - Earned Value % Complete Type Layout in Activities View

This layout clearly identifies the relationship between the selected percent complete type and the performance percent complete. It helps show the criticality of proper selection of percent complete type to determine overall performance measurement.

Layout: Earned Value Cost Variance					Filter: All Activities			
Activity ID	Activity Name	Budget At Completion	Performance % Complete	Earned Value Cost	Actual Cost	Cost Variance	Cost Performance Index	Cost Variance Index
EPMD:3.1- EVM (TeamPlay) Implement...		\$1,341,581.63	0.08%	\$1,052.00	\$2,312.00	(\$1,260.00)	0.46	-1.20
EVM1000	Start Project	\$0.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM1512	Finish Project	\$0.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EPMD:3.1-1 Charter EVM Team		\$588.00	85.71%	\$504.00	\$588.00	(\$84.00)	0.86	-0.17
EVM10	Draft EVM Team Charter	\$280.00	100%	\$280.00	\$280.00	\$0.00	1.00	0.00
EVM10	Present draft charter to 00...	\$112.00	100%	\$112.00	\$112.00	\$0.00	1.00	0.00
EVM10	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	1.00	0.00
EVM10	Present draft charter to E...	\$56.00	100%	\$56.00	\$56.00	\$0.00	1.00	0.00
EVM10	Incorporate comments fro...	\$56.00	0%	\$0.00	\$56.00	(\$56.00)	0.00	0.00
EVM10	Present charter to EPMC ...	\$28.00	0%	\$0.00	\$28.00	(\$28.00)	0.00	0.00
EPMD:3.1-2 Communicate EVM Ma...		\$1,304.00	37.73%	\$492.00	\$856.00	(\$364.00)	0.57	-0.74
EVM20	Draft EVM Scoring Criteria...	\$112.00	0%	\$0.00	\$112.00	(\$112.00)	0.00	0.00
EVM20	Present draft criteria to 00...	\$28.00	0%	\$0.00	\$28.00	(\$28.00)	0.00	0.00
EVM20	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	1.00	0.00
EVM20	Present draft criteria to E...	\$84.00	0%	\$0.00	\$84.00	(\$84.00)	0.00	0.00
EVM20	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	1.00	0.00
EVM20	Consolidate criteria memo ...	\$240.00	100%	\$240.00	\$240.00	\$0.00	1.00	0.00
EVM20	Present draft consolidated...	\$84.00	0%	\$0.00	\$84.00	(\$84.00)	0.00	0.00
EVM20	Incorporate comments fro...	\$28.00	100%	\$28.00	\$28.00	\$0.00	1.00	0.00
EVM20	Present consolidated me...	\$56.00	0%	\$0.00	\$56.00	(\$56.00)	0.00	0.00
EVM20	Revise Master Grade Cha...	\$56.00	100%	\$56.00	\$56.00	\$0.00	1.00	0.00
EVM21	Maintain MGC currency	\$504.00	11.11%	\$56.00	\$56.00	\$0.00	1.00	0.00
EPMD:3.1-3 Develop EVM PMP an...		\$37,848.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM15	Start EVM PMP Develop...	\$0.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM15	Finish EVM PMP Develop...	\$36,000.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM30	Hold Kick-off meeting	\$56.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM30	Conduct research	\$0.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM30	Participate in information ...	\$672.00	0%	\$0.00	\$0.00	\$0.00	0.00	0.00

Figure 20 - Earned Value Cost Variance Layout in Activities View

This layout analyzes the major earned value cost fields. It allows users to evaluate major performance indicators to meet planned project costs.

Layout: Earned Value Index Performance				Filter: All Activities						
Activity ID	Activity Name	Earned Value Cost	Planned Value Cost	SPI	Actual Cost	CPI	Planned Total Cost	Budget At Completion	Estimate At Completion Cost	To Complete Perfm Index
EPMD:3.1- EVM (TeamPlay) Imple...		\$1,052.00	\$437,982.52	0.00	\$2,312.00	0.46	\$1,599,573.04	\$1,341,581.63	\$1,703,221.63	0.79
EVM1512	Finish Project	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	0.00
EVM1000	Start Project	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	0.00
EPMD:3.1-1 Charter EVM Team		\$504.00	\$588.00	0.86	\$588.00	0.86	\$2,912.00	\$588.00	\$588.00	0.00
EVM10	Present charter to EP...	\$0.00	\$28.00	0.00	\$28.00	0.00	\$336.00	\$28.00	\$28.00	0.00
EVM10	Incorporate comments ...	\$0.00	\$56.00	0.00	\$56.00	0.00	\$448.00	\$56.00	\$56.00	0.00
EVM10	Incorporate comments ...	\$56.00	\$56.00	1.00	\$56.00	1.00	\$336.00	\$56.00	\$56.00	0.00
EVM10	Present draft charter to...	\$56.00	\$56.00	1.00	\$56.00	1.00	\$224.00	\$56.00	\$56.00	0.00
EVM10	Present draft charter to...	\$112.00	\$112.00	1.00	\$112.00	1.00	\$224.00	\$112.00	\$112.00	0.00
EVM10	Draft EVM Team Charter	\$280.00	\$280.00	1.00	\$280.00	1.00	\$1,344.00	\$280.00	\$280.00	0.00
EPMD:3.1-2 Communicate EVM ...		\$492.00	\$878.79	0.56	\$856.00	0.57	\$2,500.00	\$1,304.00	\$1,304.00	1.81
EVM20	Present draft criteria to...	\$0.00	\$28.00	0.00	\$28.00	0.00	\$56.00	\$28.00	\$28.00	0.00
EVM20	Incorporate comments ...	\$28.00	\$28.00	1.00	\$28.00	1.00	\$56.00	\$28.00	\$28.00	0.00
EVM20	Incorporate comments ...	\$56.00	\$56.00	1.00	\$56.00	1.00	\$56.00	\$56.00	\$56.00	0.00
EVM20	Incorporate comments ...	\$56.00	\$56.00	1.00	\$56.00	1.00	\$56.00	\$56.00	\$56.00	0.00
EVM20	Present consolidated ...	\$0.00	\$56.00	0.00	\$56.00	0.00	\$168.00	\$56.00	\$56.00	0.00
EVM20	Revise Master Grade ...	\$56.00	\$56.00	1.00	\$56.00	1.00	\$1,120.00	\$56.00	\$56.00	0.00
EVM20	Present draft criteria to...	\$0.00	\$84.00	0.00	\$84.00	0.00	\$140.00	\$84.00	\$84.00	0.00
EVM20	Present draft consolida...	\$0.00	\$84.00	0.00	\$84.00	0.00	\$112.00	\$84.00	\$84.00	0.00
EVM20	Draft EVM Scoring Crit...	\$0.00	\$112.00	0.00	\$112.00	0.00	\$112.00	\$112.00	\$112.00	0.00
EVM20	Consolidate criteria me...	\$240.00	\$240.00	1.00	\$240.00	1.00	\$120.00	\$240.00	\$240.00	0.00
EVM21	Maintain MGC currency	\$56.00	\$78.79	0.71	\$56.00	1.00	\$504.00	\$504.00	\$504.00	1.00
EPMD:3.1-3 Develop EVM PMP...		\$0.00	\$37,176.00	0.00	\$0.00	0.00	\$37,848.00	\$37,848.00	\$37,848.00	1.00
EVM30	Conduct research	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	0.00
EVM15	Start EVM PMP Devel...	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	0.00
EVM30	Hold Kick-off meeting	\$0.00	\$56.00	0.00	\$0.00	0.00	\$56.00	\$56.00	\$56.00	1.00
EVM30	Participate in informati...	\$0.00	\$0.00	0.00	\$0.00	0.00	\$672.00	\$672.00	\$672.00	1.00
EVM15	Finish EVM PMP Deve...	\$0.00	\$36,000.00	0.00	\$0.00	0.00	\$36,000.00	\$36,000.00	\$36,000.00	1.00

Figure 21 - Earned Value Index Performance Layout in Activities View

This layout illustrates how the EV indices can be used to forecast at completion cost and schedule fields.

Layout: Earned Value Performance					Filter: All Activities				
Activity ID	Activity Name	Earned Value Cost	Planned Value Cost	Schedule Variance	Actual Cost	Cost Variance	Budget At Completion	Schedule Performance Index	Cost Variance Index
EPMD:3.1- EVM (TeamPlay) Imple...		\$1,052.00	\$437,982.52	(\$436,930.52)	\$2,312.00	(\$1,260.00)	\$1,341,581.63	0.00	-1.20
EVM1512	Finish Project	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM1000	Start Project	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
EPMD:3.1-1 Charter EVM Team		\$504.00	\$588.00	(\$84.00)	\$588.00	(\$84.00)	\$588.00	0.86	-0.17
EVM10	Present charter to EP...	\$0.00	\$28.00	(\$28.00)	\$28.00	(\$28.00)	\$28.00	0.00	0.00
EVM10	Incorporate comments ...	\$0.00	\$56.00	(\$56.00)	\$56.00	(\$56.00)	\$56.00	0.00	0.00
EVM10	Incorporate comments ...	\$56.00	\$56.00	\$0.00	\$56.00	\$0.00	\$56.00	1.00	0.00
EVM10	Present draft charter to...	\$56.00	\$56.00	\$0.00	\$56.00	\$0.00	\$56.00	1.00	0.00
EVM10	Present draft charter to...	\$112.00	\$112.00	\$0.00	\$112.00	\$0.00	\$112.00	1.00	0.00
EVM10	Draft EVM Team Charter	\$280.00	\$280.00	\$0.00	\$280.00	\$0.00	\$280.00	1.00	0.00
EPMD:3.1-2 Communicate EVM ...		\$492.00	\$878.79	(\$386.79)	\$856.00	(\$364.00)	\$1,304.00	0.56	-0.74
EVM20	Present draft criteria to...	\$0.00	\$28.00	(\$28.00)	\$28.00	(\$28.00)	\$28.00	0.00	0.00
EVM20	Incorporate comments ...	\$28.00	\$28.00	\$0.00	\$28.00	\$0.00	\$28.00	1.00	0.00
EVM20	Incorporate comments ...	\$56.00	\$56.00	\$0.00	\$56.00	\$0.00	\$56.00	1.00	0.00
EVM20	Incorporate comments ...	\$56.00	\$56.00	\$0.00	\$56.00	\$0.00	\$56.00	1.00	0.00
EVM20	Present consolidated ...	\$0.00	\$56.00	(\$56.00)	\$56.00	(\$56.00)	\$56.00	0.00	0.00
EVM20	Revise Master Grade ...	\$56.00	\$56.00	\$0.00	\$56.00	\$0.00	\$56.00	1.00	0.00
EVM21	Maintain MGC currency	\$56.00	\$78.79	(\$22.79)	\$56.00	\$0.00	\$504.00	0.71	0.00
EVM20	Present draft criteria to...	\$0.00	\$84.00	(\$84.00)	\$84.00	(\$84.00)	\$84.00	0.00	0.00
EVM20	Present draft consolida...	\$0.00	\$84.00	(\$84.00)	\$84.00	(\$84.00)	\$84.00	0.00	0.00
EVM20	Draft EVM Scoring Crit...	\$0.00	\$112.00	(\$112.00)	\$112.00	(\$112.00)	\$112.00	0.00	0.00
EVM20	Consolidate criteria me...	\$240.00	\$240.00	\$0.00	\$240.00	\$0.00	\$240.00	1.00	0.00
EPMD:3.1-3 Develop EVM PMP...		\$0.00	\$37,176.00	(\$37,176.00)	\$0.00	\$0.00	\$37,848.00	0.00	0.00
EVM30	Conduct research	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM30	Participate in informati...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$672.00	0.00	0.00
EVM15	Start EVM PMP Devel...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
EVM30	Hold Kick-off meeting	\$0.00	\$56.00	(\$56.00)	\$0.00	\$0.00	\$56.00	0.00	0.00
EVM15	Finish EVM PMP Deve...	\$0.00	\$36,000.00	(\$36,000.00)	\$0.00	\$0.00	\$36,000.00	0.00	0.00

Figure 22 - Earned Value Performance Layout in Activities View

This layout displays current cost and schedule data against the planned values (baseline). Additionally, it illustrates the use of the CPI and SPI indices to forecast cost and schedule at completion data.

Layout: Earned Value Schedule Performance					Filter: All Activities						
Activity ID	Activity Name	BL Duration	Performance % Complete	Schedule % Complete	Earned Value Cost	Actual Cost	Cost Variance	Variance - Finish Date	Budget At Completion	Estimate At Completion Cost	Variance - Total Cost
[-] EPMO:3.1- EVM (Team...		235.5d	0.08%	32.65%	\$1,052.00	\$2,312.00	(\$1,260.00)	-60.0d	\$1,341,581.63	\$1,703,221.63	(\$359,764.00)
[-] EVM	Finish Project	0.0d	0%	0%	\$0.00	\$0.00	\$0.00	-60.0d	\$0.00	\$0.00	\$0.00
	EVM1 Start Project	0.0d	0%	100%	\$0.00	\$0.00	\$0.00	0.0d	\$0.00	\$0.00	\$0.00
[-] EPMO:3.1-1 Charter ...		20.0d	85.71%	100%	\$504.00	\$588.00	(\$84.00)	0.0d	\$588.00	\$588.00	\$0.00
	EV Present charter ...	1.5d	0%	100%	\$0.00	\$28.00	(\$28.00)	0.0d	\$28.00	\$28.00	\$0.00
	EV Incorporate co...	2.0d	0%	100%	\$0.00	\$56.00	(\$56.00)	0.0d	\$56.00	\$56.00	\$0.00
	EV Present draft ch...	1.0d	100%	100%	\$56.00	\$56.00	\$0.00	0.0d	\$56.00	\$56.00	\$0.00
	EV Incorporate co...	1.5d	100%	100%	\$56.00	\$56.00	\$0.00	0.0d	\$56.00	\$56.00	\$0.00
	EV Present draft ch...	1.0d	100%	100%	\$112.00	\$112.00	\$0.00	0.0d	\$112.00	\$112.00	\$0.00
	EV Draft EVM Tea...	6.0d	100%	100%	\$280.00	\$280.00	\$0.00	0.0d	\$280.00	\$280.00	\$0.00
[-] EPMO:3.1-2 Commu...		221.5d	37.73%	67.39%	\$492.00	\$856.00	(\$364.00)	-60.0d	\$1,304.00	\$1,304.00	\$0.00
	EV Maintain MGC c...	185.5d	11.11%	15.63%	\$56.00	\$56.00	\$0.00	-60.0d	\$504.00	\$504.00	\$0.00
	EV Revise Master ...	5.0d	100%	100%	\$56.00	\$56.00	\$0.00	0.0d	\$56.00	\$56.00	\$0.00
	EV Present consoli...	2.0d	0%	100%	\$0.00	\$56.00	(\$56.00)	0.0d	\$56.00	\$56.00	\$0.00
	EV Incorporate co...	2.0d	100%	100%	\$28.00	\$28.00	\$0.00	0.0d	\$28.00	\$28.00	\$0.00
	EV Present draft co...	2.0d	0%	100%	\$0.00	\$84.00	(\$84.00)	0.0d	\$84.00	\$84.00	\$0.00
	EV Consolidate crit...	3.0d	100%	100%	\$240.00	\$240.00	\$0.00	0.0d	\$240.00	\$240.00	\$0.00
	EV Incorporate co...	2.0d	100%	100%	\$56.00	\$56.00	\$0.00	0.0d	\$56.00	\$56.00	\$0.00
	EV Present draft cri...	2.0d	0%	100%	\$0.00	\$84.00	(\$84.00)	0.0d	\$84.00	\$84.00	\$0.00
	EV Incorporate co...	2.0d	100%	100%	\$56.00	\$56.00	\$0.00	0.0d	\$56.00	\$56.00	\$0.00
	EV Present draft cri...	2.0d	0%	100%	\$0.00	\$28.00	(\$28.00)	0.0d	\$28.00	\$28.00	\$0.00
	EV Draft EVM Scori...	4.0d	0%	100%	\$0.00	\$112.00	(\$112.00)	0.0d	\$112.00	\$112.00	\$0.00
[-] EPMO:3.1-3 Develo...		77.1d	0%	98.22%	\$0.00	\$0.00	\$0.00	-24.0d	\$37,848.00	\$37,848.00	\$0.00
	EV Participate in inf...	1.0d	0%	0%	\$0.00	\$0.00	\$0.00	0.0d	\$672.00	\$672.00	\$0.00
	EV Finish EVM PM...	0.0d	0%	100%	\$0.00	\$0.00	\$0.00	-65.0d	\$36,000.00	\$36,000.00	\$0.00
	EV Conduct research	3.0d	0%	100%	\$0.00	\$0.00	\$0.00	-65.0d	\$0.00	\$0.00	\$0.00
	EV Hold Kick-off m...	0.1d	0%	100%	\$0.00	\$0.00	\$0.00	-65.0d	\$56.00	\$56.00	\$0.00
	EV Start EVM PMP...	0.0d	0%	100%	\$0.00	\$0.00	\$0.00	-65.0d	\$0.00	\$0.00	\$0.00

Figure 23 - Earned Value Schedule Performance Layout in Activities View

This layout presents current cost and schedule performance against the planned values (baseline), as well as the at completion forecasted variance of cost and schedule fields.

Layout: Earned Value Schedule Variance				Filter: All Activities					
Activity ID	Activity Name	Budget At Completion	Activity % Complete	Planned Value Cost	Earned Value Cost	Schedule Variance	Schedule % Complete	Schedule Performance Index	Schedule Variance Index
EPMD:3.1- EVM (TeamPlay) Implement...		\$1,341,581.63		\$437,982.52	\$1,052.00	(\$436,930.52)	32.65%	0.00	-1.00
EVM1000	Start Project	\$0.00	0%	\$0.00	\$0.00	\$0.00	100%	0.00	0.00
EVM1513	Finish Project	\$0.00	0%	\$0.00	\$0.00	\$0.00	0%	0.00	0.00
EPMD:3.1-1 Charter EVM Team		\$588.00		\$588.00	\$504.00	(\$84.00)	100%	0.86	-0.14
EVM10	Draft EVM Team Charter	\$280.00	100%	\$280.00	\$280.00	\$0.00	100%	1.00	0.00
EVM10	Present draft charter to OO...	\$112.00	100%	\$112.00	\$112.00	\$0.00	100%	1.00	0.00
EVM10	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	100%	1.00	0.00
EVM10	Present draft charter to E...	\$56.00	100%	\$56.00	\$56.00	\$0.00	100%	1.00	0.00
EVM10	Incorporate comments fro...	\$56.00	0%	\$56.00	\$0.00	(\$56.00)	100%	0.00	-1.00
EVM10	Present charter to EPMC ...	\$28.00	0%	\$28.00	\$0.00	(\$28.00)	100%	0.00	-1.00
EPMD:3.1-2 Communicate EVM Ma...		\$1,304.00		\$878.79	\$492.00	(\$386.79)	67.39%	0.56	-0.44
EVM20	Draft EVM Scoring Criteria...	\$112.00	0%	\$112.00	\$0.00	(\$112.00)	100%	0.00	-1.00
EVM20	Present draft criteria to OO...	\$28.00	0%	\$28.00	\$0.00	(\$28.00)	100%	0.00	-1.00
EVM20	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	100%	1.00	0.00
EVM20	Present draft criteria to E...	\$84.00	0%	\$84.00	\$0.00	(\$84.00)	100%	0.00	-1.00
EVM20	Incorporate comments fro...	\$56.00	100%	\$56.00	\$56.00	\$0.00	100%	1.00	0.00
EVM20	Consolidate criteria memo ...	\$240.00	100%	\$240.00	\$240.00	\$0.00	100%	1.00	0.00
EVM20	Present draft consolidated...	\$84.00	0%	\$84.00	\$0.00	(\$84.00)	100%	0.00	-1.00
EVM20	Incorporate comments fro...	\$28.00	100%	\$28.00	\$28.00	\$0.00	100%	1.00	0.00
EVM20	Present consolidated me...	\$56.00	0%	\$56.00	\$0.00	(\$56.00)	100%	0.00	-1.00
EVM20	Revise Master Grade Cha...	\$56.00	100%	\$56.00	\$56.00	\$0.00	100%	1.00	0.00
EVM21	Maintain MGC currency	\$504.00	11.11%	\$78.79	\$56.00	(\$22.79)	15.63%	0.71	-0.29
EPMD:3.1-3 Develop EVM PMP an...		\$37,848.00		\$37,176.00	\$0.00	(\$37,176.00)	98.22%	0.00	-1.00
EVM15	Start EVM PMP Develop...	\$0.00	0%	\$0.00	\$0.00	\$0.00	100%	0.00	0.00
EVM15	Finish EVM PMP Develop...	\$36,000.00	0%	\$36,000.00	\$0.00	(\$36,000.00)	100%	0.00	-1.00
EVM30	Hold Kick-off meeting	\$56.00	0%	\$56.00	\$0.00	(\$56.00)	100%	0.00	-1.00
EVM30	Conduct research	\$0.00	0%	\$0.00	\$0.00	\$0.00	100%	0.00	0.00
EVM30	Participate in information ...	\$672.00	0%	\$0.00	\$0.00	\$0.00	0%	0.00	0.00

Figure 24 - Earned Value Schedule Variance Layout in Activities View

This layout analyzes the major earned value schedule fields. It allows users to evaluate major performance indicators to meet the project schedule.

2. OMB EXHIBIT 300 TABLE I.H.4 (PLANNED AND ACTUALS)

The following 4 layout examples are intended to facilitate completion of the OMB Exhibit 300 I.H.4 and comply with Master Grade Chart scoring criteria. The layouts highlight mapping Baselines using project and activity codes within the Project view, the WBS view, or the Activity view.

Layout: OMB 300 I.H.4 Table (Project)											
Project ID	Project Name	OMB Start Date	OMB End Date	OMB Duration	OMB Planned Cost	Actual Start	Actual Finish	Actual % Complete	Actual Total Cost	Forecast Finish Date	Estimate At Completion Cost
+	VA IT Investment (OMB300): 0000 Allocation Resourc...	13-Sep-04	30-Sep-05	264.0d	\$547,648.32	13-Sep-04		61.6%	\$319,905.50		\$530,220.12
+	VA IT Investment (OMB300): 0003 BDN Maint & Ops	24-Jun-02	12-May-11	2272.5d	\$4,526,437.22	24-Jun-02		10.56%	\$312,728.66		\$7,621,922.07
+	VA IT Investment (OMB300): 0004 Patient Financial S...	27-Feb-02	18-Apr-42	10425.5d	\$39,456,035.68	27-Feb-02		51.63%	\$21,911,872.84		\$48,628,357.82
+	VA IT Investment (OMB300): 0005 BIRLS/VADS VBA	10-Sep-03	30-Sep-05	518.0d	\$942,360.94	10-Sep-03		62.66%	\$89,222.72		\$738,483.82
+	VA IT Investment (OMB300): 0009 C&P Maint & Ops (...)	18-Nov-03	24-Sep-04	216.0d	\$102,262.70	18-Nov-03		100%	\$0.00		\$0.00
+	VA IT Investment (OMB300): 0011 CoreFLS	29-Jan-01	08-Nov-05	1206.4d	\$23,694,340.18	29-Jan-01		93.08%	\$7,326,435.88		\$7,949,657.33
+	VA IT Investment (OMB300): 0013 Data Mgmt/Prg Int...	01-Oct-02	27-Nov-09	1824.8d	\$13,158,887.64	01-Oct-02		87.7%	\$10,957,640.95		\$12,584,856.38
+	VA IT Investment (OMB300): 0015 DSS Legacy	01-Oct-02	29-Oct-04	523.0d	\$207,080.99	01-Oct-02		100%	\$622,942.64		\$2,559,905.62
+	VA IT Investment (OMB300): 0016 Educ Maint & Ops ...	17-Sep-01	31-Aug-25	84462.5d	\$122,854,347.24	13-Sep-01		56.91%	\$67,576,385.60		\$124,187,012.46
+	VA IT Investment (OMB300): 0023 Federal Health Inf...	22-Jan-02	01-Aug-05	887.0d	\$11,514,362.91	01-Mar-02		95.45%	\$3,157,440.23		\$3,472,443.18
+	VA IT Investment (OMB300): 0024 Financial Manage...	27-Oct-04	24-Jun-05	166.0d	\$48,068.29	27-Oct-04		34.39%	\$11,953.27		\$40,782.22
+	VA IT Investment (OMB300): 0026 HAC IT Operations	13-Sep-04	31-Aug-12	2056.0d	\$20,796,344.67	13-Sep-04		28.31%	\$12,504,504.36		\$22,621,967.29
+	VA IT Investment (OMB300): 0027 Health Data Repo...	01-Sep-99	26-Jul-16	4357.0d	\$117,954,025.27	01-Sep-99		15.07%	\$52,014,909.41		\$201,558,287.73
+	VA IT Investment (OMB300): 0028 Ins Sys Main & Op...	15-Nov-99	19-Apr-48	38672.0d	\$10,525,379.31	15-Nov-99		71.26%	\$6,536,154.83		\$11,290,926.68
+	VA IT Investment (OMB300): 0029 LGY Maint & Ops (...)	09-Sep-02	03-Sep-08	1518.0d	\$5,510,483.55	09-Sep-02		38.41%	\$707,718.30		\$10,547,271.50
+	VA IT Investment (OMB300): 0031 Med & Prost Rese...	13-Sep-04	03-Oct-05	265.0d	\$2,801,918.76	06-Sep-04		80.03%	\$1,331,412.51		\$1,545,318.35
+	VA IT Investment (OMB300): 0032 C&P Rep Sys VBA	06-Oct-03	18-Nov-03	30.0d	\$26,098.20	06-Oct-03	18-Nov-03	100%	\$0.00		\$0.00
+	VA IT Investment (OMB300): 0036 Pharm Re-Eng & I...	02-Jan-02	10-Oct-47	11893.0d	\$180,932,292.76	01-Jan-02		18.14%	\$24,145,754.83		\$176,315,300.87
+	VA IT Investment (OMB300): 0042 The Expert Educat...	28-Dec-99	02-Mar-11	2864.0d	\$42,160,908.84	28-Dec-99		15.34%	\$7,769,471.89		\$43,620,266.15
+	VA IT Investment (OMB300): 0056 Learning Mgmt Sy...	13-Sep-04	30-Sep-04	13.0d	\$48,342.79	13-Sep-04		0%	\$0.00		\$48,342.79
+	VA IT Investment (OMB300): 0059 VistA Imaging	28-Feb-02	17-Dec-15	107908.6d	\$126,011,030.40	09-Dec-01		52.69%	\$19,209,954.44		\$93,956,580.49
+	VA IT Investment (OMB300): 0060 VistA Legacy	16-Nov-98	16-Dec-38	10405.8d	\$881,757,658.67	24-Mar-31		31.02%	\$170,673,831.17		\$830,240,924.18
+	VA IT Investment (OMB300): 0061 VistA Sched Rep	03-Jul-00	29-Dec-06	1641.8d	\$101,833,376.60	01-Jan-00		59.56%	\$58,620,557.16		\$100,240,155.85
+	VA IT Investment (OMB300): 0065 FEE Basis Rep	01-Oct-02	30-Jun-49	12152.6d	\$1,089,124,503.59	01-Oct-01		66.39%	\$626,643,427.96		\$870,169,213.72
+	VA IT Investment (OMB300): 0086 HealthVet VistA	09-Sep-47	05-Nov-14	17468.1d	\$172,386,458.28	09-Sep-47		42.53%	\$70,993,404.38		\$164,290,640.37
+	VA IT Investment (OMB300): 0087 One-VA IT Project ...	17-Feb-04	01-May-06	555.0d	\$1,827,351.57	23-Aug-04		0.34%	\$2,879.00		\$2,071,298.73
+	VA IT Investment (OMB300): 9999 NOT related to an ...	01-Oct-01	30-Dec-05	1067.0d	\$17,826,661.51	16-Jul-00		29.63%	\$52,130,160.48		\$67,123,125.03

Figure 25 - Project level view of OMB Exhibit 300 I.H.4 Table Sorted by VA IT Investment (OMB300) Project Code

This layout, which is grouped by the VA IT Investment project code, shows the roll-up of data for all projects coded with one of these project codes. The general purpose of this layout is to verify the roll-up of the earned value data and identify and resolve discrepancies reported using activity codes.

Layout: OMB 300 I.H.4 Calculations													
Project ID		BCWS/PV	BCWP/EV	Actual Cost	Cost Variance	Cost Variance %	CPI	Schedule Variance	Schedule Variance %	SPI	EAC	Variance At Completion	ETC
+ VA IT Investment (OMB300): 0016	Educ M	72,054,430.23	1,920,436.75	576,385.60	344,051.15	0.03	1.03	\$2,133,993.48	-0.03	0.97	124,187,012.46	(\$1,332,665.22)	\$56,610,626.86
+ VA IT Investment (OMB300): 0023	Federal	11,476,228.77	1,990,216.04	157,440.23	832,775.81	0.71	3.48	(\$486,012.72)	-0.04	0.96	\$3,472,443.18	\$8,041,919.73	\$315,002.95
+ VA IT Investment (OMB300): 0024	Financi	\$31,769.71	\$16,530.00	\$11,953.27	\$4,576.73	0.28	1.38	(\$15,239.71)	-0.48	0.52	\$40,782.22	\$7,286.07	\$28,828.95
+ VA IT Investment (OMB300): 0026	HAC IT	\$6,302,969.13	1,886,473.66	504,504.36	518,030.69	-1.12	0.47	(\$416,495.47)	-0.07	0.93	\$22,621,967.29	(\$1,825,622.63)	\$10,117,462.94
+ VA IT Investment (OMB300): 0027	Health I	12,978,965.01	1,775,152.80	104,909.41	239,756.61	-1.93	0.34	\$4,796,187.79	0.37	1.37	201,558,287.73	\$83,604,262.46	\$149,543,378.32
+ VA IT Investment (OMB300): 0028	Ins Sys	\$7,755,015.40	1,500,398.29	536,154.83	964,243.47	0.13	1.15	(\$254,617.11)	-0.03	0.97	\$11,290,926.68	(\$765,547.37)	\$4,754,771.86
+ VA IT Investment (OMB300): 0029	LGY M	\$2,883,817.89	1,116,509.91	707,718.30	408,791.61	0.67	2.99	(\$767,307.98)	-0.27	0.73	\$10,547,271.50	(\$5,036,787.95)	\$9,839,553.20
+ VA IT Investment (OMB300): 0031	Med & F	\$1,611,389.68	1,242,376.44	331,412.51	910,963.92	0.41	1.68	\$630,986.76	0.39	1.39	\$1,545,318.35	\$1,256,600.41	\$213,905.84
+ VA IT Investment (OMB300): 0032	C&P Re	\$26,098.20	\$26,098.20	\$0.00	\$26,098.20	1.00	0.00	\$0.00	0.00	1.00	\$0.00	\$26,098.20	\$0.00
+ VA IT Investment (OMB300): 0036	Pharm F	35,623,825.67	1,814,147.07	145,754.83	668,392.24	0.26	1.36	\$2,809,678.60	-0.08	0.92	176,315,300.87	\$4,616,991.88	\$152,169,546.04
+ VA IT Investment (OMB300): 0042	The Exp	\$6,638,103.30	1,467,014.28	769,471.89	302,457.61	-0.20	0.83	(\$171,089.02)	-0.03	0.97	\$43,620,266.15	(\$1,459,357.31)	\$35,850,794.26
+ VA IT Investment (OMB300): 0056	Learnin	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$48,342.79	\$0.00	\$48,342.79
+ VA IT Investment (OMB300): 0059	VistA In	53,442,386.92	1,391,465.59	209,954.44	181,511.15	0.71	3.46	\$2,949,078.67	0.05	1.05	\$93,956,580.49	\$32,054,449.91	\$74,746,626.05
+ VA IT Investment (OMB300): 0060	VistA Le	37,998,541.31	1,557,504.94	673,831.17	883,673.77	0.38	1.60	(\$4,441,036.37)	-0.05	0.95	330,240,924.18	\$51,516,734.50	\$659,567,093.01
+ VA IT Investment (OMB300): 0061	VistA Sc	31,313,291.47	1,651,224.10	620,557.16	1030,666.93	0.03	1.03	(\$662,067.37)	-0.01	0.99	100,240,155.85	\$1,593,220.75	\$41,619,598.69
+ VA IT Investment (OMB300): 0065	FEE Ba	79,925,129.33	1,050,759.92	643,427.96	407,331.96	0.13	1.15	143,125,630.59	0.25	1.25	370,169,213.72	218,955,289.87	\$243,525,785.75
+ VA IT Investment (OMB300): 0086	Healthe	38,308,987.09	1,314,893.28	993,404.38	321,488.90	0.03	1.03	(\$14,994,093.81)	-0.17	0.83	164,290,640.37	\$8,095,817.91	\$93,297,235.99
+ VA IT Investment (OMB300): 0087	One-VA	\$824,455.36	\$6,166.87	\$2,879.00	\$3,287.87	0.53	2.14	(\$818,288.49)	-0.99	0.01	\$2,071,298.73	(\$243,947.16)	\$2,068,419.73

Figure 26 - Project level view of OMB Exhibit 300 I.H.4 Calculations Sorted by VA IT Investment (OMB300) Project Code
(Global Project Layout OMB 300 I.H.4 Calculations)

This layout, which is grouped by the VA IT Investment project code, shows the roll-up of data for all projects coded with one of these project codes. The general purpose of this layout is to verify the roll-up of the earned value calculations required as part of Section I.H.4 in the OMB Exhibit 300.

Layout: OMB 300 I.H.4 Table 2				Filter: All Activities					
Activity ID	Activity Name	OMB Start Date	OMB End Date	OMB Duration	OMB Planned Cost	Actual Start	Actual Finish	Actual % Complete	Actual Total Cost
EPMD:1.2 2005 PM Conference		23-Aug-04	23-Jun-05	210.0d	\$434,329.94	23-Aug-04		0.38%	\$343.00
PMC1000	Start PM Conference Planning	23-Aug-04		0.0d	\$0.00			0%	\$0.00
PMC10070	Finish PM Post-Conference		23-Jun-05	0.0d	\$0.00			0%	\$0.00
EPMD:1.2.1 Conference Approval		23-Aug-04	15-Oct-04	38.0d	\$0.00	23-Aug-04	20-Oct-04	0%	\$0.00
PMC1010	Draft conference approval package	23-Aug-04	27-Aug-04	5.0d	\$0.00	23-Aug-04	27-Aug-04	100%	\$0.00
PMC1020	Draft transmittal memo and briefing note	30-Aug-04	02-Sep-04	4.0d	\$0.00	24-Aug-04	27-Sep-04	0%	\$0.00
PMC1030	Edit conference approval package	03-Sep-04	03-Sep-04	1.0d	\$0.00	27-Aug-04	27-Aug-04	0%	\$0.00
PMC1040	Submit approval package through review	06-Sep-04	15-Oct-04	30.0d	\$0.00	30-Aug-04	19-Oct-04	0%	\$0.00
PMC1050	Receive approval / not approval		15-Oct-04	0.0d	\$0.00		20-Oct-04	0%	\$0.00
EPMD:1.2.2 Conference Content Plan		06-Sep-04	21-Sep-04	11.0d	\$2,601.04	24-Sep-04	14-Oct-04	0%	\$56.00
PMC2000	Identify committee members	06-Sep-04	06-Sep-04	1.0d	\$0.00	24-Sep-04	24-Sep-04	100%	\$56.00
PMC2010	Schedule and Prepare for meeting	07-Sep-04	15-Sep-04	7.0d	\$0.00	30-Sep-04	08-Oct-04	100%	\$0.00
PMC2020	Conduct planning meeting	16-Sep-04	17-Sep-04	2.0d	\$2,601.04	13-Oct-04	14-Oct-04	0%	\$0.00
PMC2030	Summarize meeting notes and materials	20-Sep-04	21-Sep-04	2.0d	\$0.00	13-Oct-04	14-Oct-04	0%	\$0.00
EPMD:1.2.3 Conference Administrative Plan		22-Sep-04	03-Feb-05	91.0d	\$65,135.00	23-Aug-04		0%	\$0.00
PMC3000	Research potential conference dates	22-Sep-04	05-Oct-04	10.0d	\$0.00	13-Oct-04	15-Dec-04	0%	\$0.00
PMC3010	Research potential conference locations	22-Sep-04	19-Oct-04	20.0d	\$0.00	13-Oct-04	30-Dec-04	0%	\$0.00
PMC3020	Solicit location interest and availability via	20-Oct-04	30-Nov-04	30.0d	\$21,019.68	23-Aug-04	21-Oct-04	0%	\$0.00
PMC3030	Select target city for conference		30-Nov-04	0.0d	\$0.00		03-Jan-05	0%	\$0.00
PMC3040	COMPLETE 2268 (SBA review for target)	01-Dec-04	07-Dec-04	5.0d	\$3,747.60	03-Jan-05	18-Feb-05	0%	\$0.00
PMC3050	CHECK CCR	08-Dec-04	14-Dec-04	5.0d	\$1,029.60			0%	\$0.00
PMC3060	GET solicitation number	15-Dec-04	21-Dec-04	5.0d	\$1,029.60			0%	\$0.00
PMC3070	ADVERTISE conference specs on FedB	22-Dec-04	05-Jan-05	11.0d	\$2,265.12	03-Jan-05	10-Jan-05	0%	\$0.00
PMC3080	REVIEW proposals and contracts	06-Jan-05	12-Jan-05	5.0d	\$2,388.60	31-Jan-05	02-Feb-05	0%	\$0.00
PMC3090	SELECT hotel or conference center		13-Jan-05	1.0d	\$448.00		03-Feb-05	0%	\$0.00
PMC3100	DEVELOP hotel contract	14-Jan-05	20-Jan-05	5.0d	\$1,029.60	08-Feb-05	24-Feb-05	0%	\$0.00
PMC3110	SEND contract package for technical re		27-Jan-05	5.0d	\$1,029.60		25-Feb-05	0%	\$0.00
PMC3120	SEND contract package for legal review		03-Feb-05	5.0d	\$3,747.60		11-Mar-05	0%	\$0.00
PMC3130	FINALIZE hotel contract		03-Feb-05	0.0d	\$27,400.00		15-Mar-05	0%	\$0.00

**Figure 27 - Activity level view of OMB Exhibit 300 I.H.4 Table
(Global Activity Layout OMB 300 I.H.4 Table_2)**

This layout, when grouped by the appropriate activity code, represents the values for completing Table I.H.4 in the OMB Exhibit 300. Project Managers may use this view to create a report using the Reports Wizard. Section III of this guide contains a sample report based on this view.

Layout: OMB 300 I.H.4 Calculations			Filter: All Activities											
Activity ID	Activity Name	BCWS/PV	BCWP/EV	Actual Cost	Cost Variance	Cost Variance %	CPI	Schedule Variance	Schedule Variance %	SPI	EAC	Variance At Completion	ETC	
EPMD:1.2	2005 PM Conference	\$386,472.84	\$1,657.53	\$343.00	\$1,314.53	0.79	4.83	\$4,815.31	-1.00	0.00	\$310,741.10	\$123,588.84	\$310,398.10	
PMC1000	Start PM Conference Planning	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC10070	Finish PM Post-Conference	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
EPMD:1.2.1	Conference Approval	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC1010	Draft conference approval package	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC1020	Draft transmittal memo and briefing note	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC1030	Edit conference approval package	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC1040	Submit approval package through review	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC1050	Receive approval / not approval	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
EPMD:1.2.2	Conference Content Plan	\$2,601.04	\$0.00	\$56.00	(\$56.00)	0.00	0.00	\$2,601.04	-1.00	0.00	\$1,158.00	\$1,443.04	\$1,102.00	
PMC2000	Identify committee members	\$0.00	\$0.00	\$56.00	(\$56.00)	0.00	0.00	\$0.00	0.00	0.00	\$56.00	(\$56.00)	\$0.00	
PMC2010	Schedule and Prepare for meeting	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC2020	Conduct planning meeting	\$2,601.04	\$0.00	\$0.00	\$0.00	0.00	0.00	\$2,601.04	-1.00	0.00	\$1,102.00	\$1,499.04	\$1,102.00	
PMC2030	Summarize meeting notes and materials	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
EPMD:1.2.3	Conference Administrative Plan	\$65,135.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$65,135.00	-1.00	0.00	\$29,534.40	\$35,600.60	\$29,534.40	
PMC3000	Research potential conference dates	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC3010	Research potential conference locations	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC3020	Solicit location interest and availability via	\$21,019.68	\$0.00	\$0.00	\$0.00	0.00	0.00	\$21,019.68	-1.00	0.00	\$0.00	\$21,019.68	\$0.00	
PMC3030	Select target city for conference	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	
PMC3040	COMPLETE 2268 (SBA review for target...	\$3,747.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$3,747.60	-1.00	0.00	\$0.00	\$3,747.60	\$0.00	
PMC3050	CHECK CCR	\$1,029.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$1,029.60	-1.00	0.00	\$1,067.20	(\$37.60)	\$1,067.20	
PMC3060	GET solicitation number	\$1,029.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$1,029.60	-1.00	0.00	\$1,067.20	(\$37.60)	\$1,067.20	
PMC3070	ADVERTISE conference specs on FedB...	\$2,265.12	\$0.00	\$0.00	\$0.00	0.00	0.00	\$2,265.12	-1.00	0.00	\$0.00	\$2,265.12	\$0.00	
PMC3080	REVIEW proposals and contracts	\$2,388.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$2,388.60	-1.00	0.00	\$0.00	\$2,388.60	\$0.00	
PMC3090	SELECT hotel or conference center	\$448.00	\$0.00	\$0.00	\$0.00	0.00	0.00	(\$448.00)	-1.00	0.00	\$0.00	\$448.00	\$0.00	
PMC3100	DEVELOP hotel contract	\$1,029.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$1,029.60	-1.00	0.00	\$0.00	\$1,029.60	\$0.00	
PMC3110	SEND contract package for technical re...	\$1,029.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$1,029.60	-1.00	0.00	\$0.00	\$1,029.60	\$0.00	
PMC3120	SEND contract package for legal review	\$3,747.60	\$0.00	\$0.00	\$0.00	0.00	0.00	\$3,747.60	-1.00	0.00	\$0.00	\$3,747.60	\$0.00	
PMC3130	FINALIZE hotel contract	\$27,400.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$27,400.00	-1.00	0.00	\$27,400.00	\$0.00	\$27,400.00	

Figure 28 - Activity level view of OMB Exhibit 300 I.H.4 Calculations
(Global Activity Layout OMB 300 I.H.4 Calculations)

This layout, when grouped by the appropriate activity code, shows the earned value data for each activity. The general purpose of this layout is to verify the roll-up of the earned value calculations required as part of Section I.H.4 in the OMB Exhibit 300 as compared with the project view.

III. EARNED VALUE MANAGEMENT-RELATED REPORTS

One of the fundamental reasons for reporting is to assess and communicate project health by identifying variances in cost, schedule and estimated completion. Significant variances will trigger analysis, determination of corrective actions and re-planning, if necessary, at various levels of the project structure.

IT Project Office has a series of Earned Value Management-related report templates. This section of the IT Project Office Earned Value Management User Guide illustrates the contents of those reports. The reports are accessed by selecting “Reports” from the Directory Bar on the left side of the screen or by selecting Tools/Reports from the menu bar. The user may then navigate to the appropriate report groupings to find the desired report. When identified, the user selects “Run Report” from the Command bar on the right side of the screen. It is **HIGHLY** recommended that print preview be selected before running the report to verify contents of the report. Header, footer, and margins may be customized for each project if desired, and the report saved with the project.

NOTE: It is important that the user pays attention to report groups. Many if not most of the “global” reports run against individual projects. However, to ensure this does not happen, the report should be copied and pasted in the Default Group and Sort layout to the project for which it will be run. Thereafter, it can be run from that project, avoiding any possible confusion.

A. PROJECT EARNED VALUE REPORT

10-Jan-05 15:43

EP-02 EPS, Project Earned Value



Project ID	Project Name	BCWS	BCWP	ACWP	BAC	ETC	EAC	VAC
Bids	Bid Projects	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OzBuild	ozbuild Bid Projects	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OZB	RFP1810004	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Opportunities	Contract Opportunities	\$58,000.00	\$2,000.00	\$3,400.00	\$631,310.00	\$658,910.00	\$662,310.00	(\$31,000.00)
AAIP-2	AAIP Master092504.mpp	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Opp1	Possible Opportunity	\$12,000.00	\$0.00	\$0.00	\$12,000.00	\$12,000.00	\$12,000.00	\$0.00
HRSYS	HR System Upgrade	\$10,000.00	\$2,000.00	\$3,400.00	\$13,200.00	\$40,800.00	\$44,200.00	(\$31,000.00)
NEWEPS	(New EPS)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Test	Test	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ	(New Projed)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ-1	(New Projed)-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWPROJ-2	(New Projed)-2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NEWEPS-1	(New EPS)-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Figure 29 - Global Report EP-02 EPS, Project Earned Value

The “EPS, Project Earned Value” Report provides an enterprise summary of selected earned value data elements for each project in the enterprise. It is listed in the “Cost and Schedule” report group within the “All Projects/ Portfolio Analyst” report group. Data from this report may be used to manually calculate SPI and CPI for an independent validation outside the tool. The lowest level in the EPS is the project.

B. WBS EARNED VALUE DEFINITION LIST REPORT

EVMS SDLC

14-Apr-05 03:42 PM

WB-05 WBS Earned Value Definition List

WBS Code	WBS Name	EV % Complete Technique	EV % Complete Factor	EV ETC Technique	EV Perf. Factor
CMS EHR	CMS Project	Activity % Complete		Remaining Total Cost	
CS	Common Services	Activity % Complete	6	Remaining Total Cost	0.88
0045A-CS	Common Services Program Activities	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PSIM	Person Service Identity Management	Activity % Complete	6	Remaining Total Cost	0.88
0045A-NPI	National Provider Index	Activity % Complete	6	Remaining Total Cost	0.88
0045A-CAIP	CAIP - Cross-Application Integration Protocol Project Plan	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PS-D	Person Service - Person Demographics	Activity % Complete	6	Remaining Total Cost	0.88
0045A-PS-PL	Person Service - Person Lookup	Activity % Complete	6	Remaining Total Cost	0.88
0045A-SDS	SDS - Standard Data Services - formerly Reference Table Management Services (RTMS)	50/50 % Complete	6	(BAC - BCWP) / (CPI * SPI)	0.88
0045 - Person	Person Services for HealtheVet	Activity % Complete	6	Remaining Total Cost	0.88

Figure 30 - Global Report WB-05 WBS Earned Value Definition List

The “WBS Earned Value Definition List” report provides insight into how earned value management is calculated at the WBS level for all projects in the enterprise. It is listed in the “Project/WBS Details” report group within the “All Projects/ Portfolio Analyst” report group. This can be useful to Project Managers for quality reviews of settings.

D. ACTIVITY EARNED VALUE REPORT

HR System Upgrade
Report Date 10-Jan-05 16:12



Project Start 13-Jan-04
Project Finish 02-Mar-04
Data Date 03-Feb-04

AC-01 Activity Earned Value

WBS						
Activity ID	Activity Name	Activity	BCWS	BCWP	ACWP	
HRSYS	HR System Upgrade					
HRSYS.1	System Development					
HRSYS.1.1	System Requirements					
HR1000	Start Development Milestone	Not Started	\$0.00	\$0.00	\$0.00	
HR1010	Define operational concept of new system	Not Started	\$0.00	\$0.00	\$0.00	
HR1020	Perform system requirements analysis	In Progress	\$2,000.00	\$0.00	\$400.00	
Subtotal			\$2,000.00	\$0.00	\$400.00	
HRSYS.1.2	System Design					
HR1030	Bid Solicited	Completed	\$0.00	\$0.00	\$0.00	
HR1031	Contract Awarded	Completed	\$0.00	\$0.00	\$0.00	
HR1032	Write Code	In Progress	\$8,000.00	\$2,000.00	\$3,000.00	
HR1033	Code Written	Not Started	\$0.00	\$0.00	\$0.00	
Subtotal			\$8,000.00	\$2,000.00	\$3,000.00	
Subtotal			\$10,000.00	\$2,000.00	\$3,400.00	
Subtotal			\$10,000.00	\$2,000.00	\$3,400.00	

Figure 31 - Global Report AC-01 Activity Earned Value

The AC-01 Activity Earned Value report displays information for open projects only at the WBS/Activity level. Data includes planned value (BCWS), earned value (BCWP) and actual cost (ACWP) cost information. The “Activity Earned Value” report is listed in the “Cost” report group within the “Open Projects” report group.

E. PROJECT EARNED VALUE REPORT FOR OMB EXHIBIT 300

19-May-05 15:15

OMB Exhibit 300 I.H.4 A (Investment Comparison Table) for EPMD Initiative

Activity Name	OMB Start Date	OMB End Date	OMB Duration	OMB Planned Cost	Actual Start	Actual Finish	Actual % Complete	Actual Total Cost
1.1 50 Project Management Certified Employees	12-Oct-04	18-Apr-05	129.0d	\$51,440.00	12-Oct-04		0%	\$224.00
1.2 PM Conference Conducted	23-Aug-04	23-Jun-05	210.0d	\$434,329.94	23-Aug-04		0.38%	\$343.00
1.3 PM Contract Vehicles Administered			0.0d	\$0.00			0%	\$0.00
2.1 PFM and PM processes and procedures continuously improved			0.0d	\$0.00			0%	\$0.00
2.2 One Select Phase review and three Control Phase reviews covering all Exhibit 300s conducted	17-Feb-04	03-Apr-06	535.0d	\$0.00			0%	\$0.00
2.3 5-year IT Strategic Plan revised and the IT policy librarian function performed	17-Feb-04	01-May-06	555.0d	\$0.00			0%	\$0.00
2.4 10 independent program management and post implementation reviews conducted			0.0d	\$0.00			0%	\$0.00
3.1 TeamPlay in-use on 98% of Exhibit 300s (excluding Steady State 300s)	12-Oct-04	19-Sep-05	235.5d	\$1,341,581.63	12-Oct-04		0.34%	\$2,312.00

**Figure 32 - Project Report Created Using Report Wizard
with Global Activity Layout OMB 300 I.H.4 Table_2 and Activity Code Grouping**

This report will be used by OMB Exhibit 300 Project Managers annually to complete the Table in Section I.H.4 A. This report is based on the activity layout discussed in Section II-G of this Guide grouped by the EMPO activity code. The total values generated by this report may be validated using the Global Layout entitled OMB 300 I.H.4 Table (Project).

OMB Investment Summary Information (I.H.4 Calculations)

Activity Name	BCWS/PV	BCWP/EV	Actual Cost	Cost Variance	Cost Variance %	CPI	Schedule Variance	Schedule Variance %	SPI	EAC	Variance At Completion	ETC
1 1.1 50 Project Management Certified Employees	\$0.00	\$0.00	\$224.00	(\$224.00)	0.00	0.00	\$0.00	0.00	0.00	\$51,664.00	(\$224.00)	\$51,440.00
2 1.2 PM Conference Conducted	\$386,472.84	\$1,657.53	\$343.00	\$1,314.53	0.79	4.83	\$4,815.31)	-1.00	0.00	\$310,741.10	\$123,588.84	\$310,398.10
3 1.3 PM Contract Vehicles Administered	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00
4 2.1 PFM and PM processes and procedures continuously improved	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00
5 2.2 One Select Phase review and three Control Phase reviews covering all Exhibit 300s conducted	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00
6 2.3 5-year IT Strategic Plan revised and the IT policy librarian function performed	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00
7 2.4 10 independent program management and post implementation reviews conducted	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00
8 3.1 TeamPlay in-use on 98% of Exhibit 300s (excluding Steady State 300s)	\$437,982.52	\$4,509.33	\$2,312.00	\$2,197.33	0.49	1.95	\$3,473.19)	-0.99	0.01	1,708,893.63	\$367,312.00)	1,706,581.63

**Figure 33 - Project Report Created Using Report Wizard
with Global Activity Layout OMB 300 I.H.4 Calculations and Activity Code Grouping**

This report will be used by OMB Exhibit 300 Project Managers annually to complete Section I.H.4 B. This report was created using the Report Wizard of the Activity View layout discussed in Section II-G of this Guide and is grouped and summarized by the EMPO activity code. The values generated by this report may be used to validate the information displayed in the Global Layout entitled OMB 300 I.H.4 Calculations.